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EVALUATION

**on the interim evaluation of the Creative Europe programme 2021-2027 and final
evaluation of the Creative Europe Programme 2014-2020**

Accompanying the document

**Report from the Commission to the European Parliament, the Council, the European
Social and Economic Committee and the Committee of the Regions - a Decade of
Creative Europe**

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Glossary

<i>Term or acronym</i>	<i>Meaning or definition</i>
Creative Europe 1/CE1	Creative Europe 2014-2020 Programme
Creative Europe 2/CE2	Creative Europe 2021-2027 Programme
CCS	Cultural and Creative Sectors Cultural and creative sectors are those producing and distributing goods or services which at the time they are developed are considered to have a specific attribute, use or purpose which embodies or conveys cultural expressions, irrespective of the commercial value they may have and in particular, including those industries which use culture as an input and have a cultural dimension, although their outputs are mainly functional. As defined in Regulation (EU) 2021/818, those sectors include, inter alia, architecture, archives, libraries and museums, artistic crafts, audiovisual (including film, television, video games and multimedia), tangible and intangible cultural heritage, design (including fashion design), festivals, music, literature, performing arts (including theatre and dance), books and publishing, radio, and visual arts.
AV	Audiovisual
UN SDG	UN sustainable development goal
CCS GF	Cultural and Creative Sectors Guarantee Facility
AVMSD	Audiovisual Media Services Directive
(DG) EAC	(Directorate-General) for Education, Youth, Sport and Culture
(DG) CNECT	(Directorate-General) for Communications Networks, Content and Technology
EACEA	European Education and Culture Executive Agency
EEA	European Economic Area
EFTA	European Free Trade Association
TEU	Treaty of European Union
TFEU	Treaty on the Functioning of the European Union
AWP	Annual Work Programme
VoD	Video-on-Demand

1. INTRODUCTION

1.1. Purpose and scope of the evaluation/fitness check

The Creative Europe Programme is the European Union's funding programme for support to the cultural, creative and audiovisual sectors. It was established in 2013 by Regulation (EU) 1295/2013 of the European Parliament and of the Council (hereinafter 'the 2014-2020 Creative Europe Regulation'),¹ integrating the Culture, MEDIA 2007 and MEDIA Mundus programmes into one single funding instrument. In 2021, a new Creative Europe was established for the period 2021-2027 (Regulation (EU) 2021/818 of the European Parliament and of the Council (hereinafter 'the 2021-2027 Creative Europe Regulation'))² maintaining the core aspects of the first Programme, while introducing some new elements.

This evaluation is carried out in line with Article 21(2) of Regulation (EU) 2021/818, requiring the Commission to carry out by 31 December 2024 an interim evaluation of the 2021-2027 Programme. It is also carried out in line with Articles 18(5) and 18(6) of Regulation (EU) 1295/2013, requiring the Commission to perform by 30 June 2022 a final evaluation of the 2014-2020 Programme. Following the COVID-19 pandemic and its consequences on cultural and creative sectors, the decision was taken in November 2021 to align Creative Europe's evaluation approach with other DG Education, Youth, Sport and Culture (EAC) coordinated programmes (such as Erasmus +). The final evaluation of the 2014-2020 Programme was then to be performed together with the interim evaluation of the current Programme. The evaluation examines actions from 2014-2023 in all Member States and third countries associated with the Programme. The evaluation aims to establish lessons learned from the former and current Programmes and to still inform the implementation of the Creative Europe Programme under the 2021-2027 MFF. The findings have also contributed to the impact assessment for the Creative Europe successor Programme - AgoraEU.³ Additionally, the evaluation is intended to enhance the knowledge base in the cultural, creative, and audiovisual sectors, offering insights for future policy development and practical implementation. The evaluation assesses the performances of the Programme against the five evaluation criteria established in the Better Regulation Guidelines and Toolbox:⁴

- The effectiveness of the measures taken to achieve the Programme objectives, including the new initiatives;
- The efficiency of the Programme, including simplification measures put in place, as well as the scope for further simplification and burden reduction;
- The continued relevance of the objectives of the Programme;
- The Programme's internal and external coherence with other programmes with similar or complementary objectives; and

¹ Regulation (EU) No 1295/2013 of the European Parliament and of the Council of 11 December 2013 establishing the Creative Europe Programme (2014 to 2020) and repealing Decisions No 1718/2006/EC, No 1855/2006/EC and No 1041/2009/EC (OJL 347, 20.12.2013, p. 221-237).

² Regulation (EU) 2021/818 of the European Parliament and of the Council of 20 May 2021 establishing the Creative Europe Programme (2021 to 2027) and repealing Regulation (EU) No 1295/2013 (OJL 189, 28.5.2021, p.34-60).

³ [EUR-Lex - 52025PC0550 - EN - EUR-Lex](#)

⁴ <https://ec.europa.eu/info/law/better-regulation/>

- The EU added value resulting from the actions and activities supported by the Programme, including in terms of sustainable impact, compared with what could reasonably have been achieved by Member States at national and/or regional levels.

The evaluation examines the results and long-term impact of the Creative Europe 2014-2020 and the mid-term results of Creative Europe 2021-2027. This Staff Working Document (SWD) draws mainly, among other sources,⁵ on the supporting study conducted by ECORYS Europe EEIG SA (tender lead) and KEA European Affairs SRL (partner), under contract with the European Commission, Directorate-General for Education, Youth, Sport and Culture (DG EAC).⁶

The evaluation was conducted using a mixed method approach combining quantitative elements (Programme data, Eurostat data, survey data, counterfactual methods) with qualitative elements (e.g. interviews, literature review and desk research). More specifically, it included:

- Comprehensive desk research, which consisted of a literature review and quantitative desk research;
- A counterfactual analysis on the impact of the MEDIA strand;
- A contribution analysis using a mix of quantitative and qualitative data for the Culture strand;
- Consultation activities, detailed in Annex V.

However, some challenges exist. While the evaluation made use of large, detailed external datasets, some gaps in the data available remain (see ‘Lessons learned’ section). Additionally, there is potential for missing perspectives in interviews, and the possibility of bias in self-reported data from participants when it comes to surveys conducted for the evaluation. It is also challenging to assess the impact of new actions under Creative Europe 2, because their impacts are likely to materialise over a longer time period. Despite these challenges and limitations, the methodology provides a solid foundation for assessing the Programme.

2. WHAT WAS THE EXPECTED OUTCOME OF THE INTERVENTION?

2.1. Description of the intervention and its objectives

Culture and media ⁽⁷⁾ are the backbone of the European project: they underpin the core values upon which the EU is founded – *respect for human dignity, freedom, democracy, equality, the rule of law and respect for human rights, including the rights of persons belonging to minorities*.⁸ This is even more important in periods marked by geopolitical tensions, the rise of extremism and disinformation.⁹ Culture and media matter for Europe and its people: they foster a sense of belonging to a common space and add value to the lives of individuals. They help to improve quality of life and mental health. They also bring cohesion to our societies and attractiveness to our regions.

⁵ Annex II. Methodology and Analytical models used.

⁶ See Annex I. Procedural Information.

⁷ The role of the media goes beyond culture, and media is governed under the single market framework.

⁸ Treaty on the European Union, Article 2 (link: [Consolidated version of the Treaty on European Union](#)).

⁹ As defined in the European Democracy Action Plan 2020 & Defence of Democracy Package 2023: disinformation is false or misleading content that is spread with an intention to deceive or secure economic or political gain and which may cause public harm

The EU's role in the field of culture is specified in Article 167 of the TFEU, a supporting competence for the EU to contribute to the flowering of the cultures of the Member States, while respecting their national and regional diversity and at the same time bringing the common cultural heritage to the fore. The support for culture is coherent with this framework.

The EU has adopted single market policy and legislation (governed by Treaty articles on the Single Market, Industry, Competition) for the copyright-intensive industries and, in particular, for the audiovisual and media sectors. The support to audiovisual and media is coherent with this framework.

Thus the 2021 legal basis of Creative Europe is based on Article 167(5), and Article 173(3) of the TFEU.

At the same time, the budget of Creative Europe is relatively modest, equivalent to 0,2% of the 2021-2027 MFF. Total MEDIA support in the same period accounts for less than 1% of total national support (including to public broadcasting and film funds) to the audiovisual industry in the EU27 Member States¹⁰. Therefore, the outcomes expected of Creative Europe in addressing the key challenges of the cultural and creative sectors are limited, as the Programme is implemented in full respect of subsidiarity. However, it remains true that few other programmes -especially at national level- provide comparable support for cross-border collaboration, where Creative Europe has strong EU added value.

Challenges and needs of the cultural and creative sectors

The Cultural and Creative Industries ecosystem plays a key role in the EU economy. It has been identified as one of 14 key industrial ecosystems in the EU Industrial Strategy¹¹. The ecosystem represents approximately 3.95% of EU value added, employs 8 million people and includes around 1.2 million businesses, of which over 99.9% are small and medium-sized enterprises with the biggest share of micro-SMEs (96,4%) among all industrial ecosystems.¹² At the same time, the ecosystem includes large companies like broadcasters and Hollywood major studios and even global tech giants. Overall, the CCS are estimated to be bigger than other strategic sectors such as chemicals or automobiles. However, the sector was particularly hit by the pandemic, especially when it comes to offline cultural activities.

As highlighted in the explanatory memorandum of the Commission's proposal for a Regulation establishing Creative Europe 2,¹³ the CCS face a number of challenges:

[...]

- *First, the cultural and creative sectors in Europe have to face increased competition from new and strong global players such as search engines and web based social platforms. This has led to the need to develop new business models*

¹⁰ MEDIA support between 2021 and 2023 equalled only 0.8% of total national support to public service broadcasting in the EU27 member states and this share would be even lower when including other types of national public support to the AV industry, including for film production for example. Source for total public support for public service broadcasting: European Audiovisual observatory, 2024 Yearbook.

¹¹ Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions Updating the 2020 New Industrial Strategy: Building a stronger Single Market for Europe's recovery COM(2021) 350 final, 5.5.2021

¹² Annual Single Market Report 2021 SWD(2021) 352 final, 5.5.2021

¹³ [Proposal for Regulation establishing the Creative Europe Programme | Shaping Europe's digital future](#)

and realise the potential for growth by taking advantage of digital technologies in order to be competitive in a global market.

- Second, the digital shift is bringing about a change in paradigm, having a massive impact on how cultural goods are created, managed, disseminated, accessed, consumed and monetised, changing the value propositions that prevailed in the analogue era. Digitisation has facilitated the distribution of cultural and creative content and services, but it has also intensified competition of content across borders on a global scale.*
- Third, there is a highly fragmented market for cultural and creative works stemming largely from Europe's cultural and linguistic diversity, which results in the cultural and creative sectors being essentially fragmented along national and linguistic lines and lacking critical mass. This diversity is part of Europe's cultural richness. At the same time, the transnational circulation of works remains limited. It is therefore important to stimulate the transnational circulation and co-production of works across borders and to develop more effective solutions to reach audiences across borders.*
- Fourth, market concentration is a growing concern. In certain cultural and creative fields, a trend is emerging where a limited number of major players account for a large part of global sales.*
- Fifth, Europe's audiovisual industry is internationally recognised, but it is not competitive enough within the Digital Single Market. 80% of European films are national productions but co-productions travel better than national films. In some countries, audio-visual professionals need to strengthen their capacity to operate.*
- Finally, there is a growing phenomenon of disinformation. Content industries, in particular the news media sector, are at the core of the fight to maintain a culture of healthy democratic debate. Artistic freedom and a diverse and free media environment are central to conveying diverging opinions and perspectives. They contribute to pluralistic societies where citizens are able to make informed choices, including in the context of political elections.*

These challenges of a trans-national nature require a targeted European approach to optimise the potential of the sectors to contribute to jobs, growth and social inclusion, including for the most disadvantaged and hard-to-reach groups. They are common to all EU Member States and have cross-border dimensions. Indeed, while action at national level is important, the single Member States on their own do not have enough leverage to fully address them [...]

Objectives and priorities of Creative Europe

The general objectives of the Programme are to safeguard, develop and promote European cultural and linguistic diversity and heritage; and to increase the competitiveness and the economic potential of the cultural and creative sectors, in particular the audiovisual sector.¹⁴

Both CE 2014-2020 and CE 2021-2027 Programmes share broadly comparable general and specific objectives that focus on promoting transnational cooperation, co-creation, innovation, circulation, and mobility within the European cultural and creative sectors. Both aim to bring added value by strengthening the capacity of these sectors to operate beyond national borders, emphasising collaboration and circulation of works and ideas, and recognising the dual nature of the cultural and creative sectors, their cultural and

¹⁴ Article 3 (1) of the 2021-2027 Creative Europe Regulation

economic value. The Culture strand of both Programmes highlights the importance of transnational actions that complement regional, national, and international policies, thereby enhancing cultural diversity and promoting shared European heritage and identity. Both Programmes also stress the need for cooperation among cultural players, including artists and cultural, creative, and audiovisual professionals, to tackle common challenges and create economies of scale that leverage additional funding. For MEDIA, there is more emphasis in Creative Europe 2021-2027 on the competitiveness of the audiovisual industry, owing to the increased competition from global players in the EU market, for example the growing position of non-European platforms in the distribution of content, and the changes in media production and consumption.

The **specific objectives** of Creative Europe 1 (2014-2020) and Creative Europe 2 (2021-2027) are detailed in Annex VI.

The Union's media policy is governed by the single market provisions of TFEU, particularly Articles 26 (establishing the internal market), 56 (ensuring the free movement of services), 101-109 (addressing competition rules) and 173 (competitiveness). These articles ensure the free movement of audiovisual services across EU Member States, supporting the creation of an integrated digital single market. The AVMSD aligns with these provisions by setting common standards for content regulation, advertising, and consumer protection, while allowing for some flexibility at the national level. This approach promotes cross-border distribution of media content, strengthens competition, and supports a diverse and pluralistic media landscape across the EU. Moreover, the European Media Freedom Act lays down common rules for the proper functioning of the internal market for media services, safeguards the independence and pluralism of media services and establishes the European Board for Media Services.

The Programme has finally to be seen in the context of the Commission's communication entitled 'A New European Agenda for Culture',¹⁵ which sets out objectives for the CCS. The Agenda aims to harness the power of culture and cultural diversity for social cohesion and societal well-being by fostering the cross-border dimension of cultural and creative sectors and fostering their capacity to grow, to encourage culture-based creativity in education and innovation, and for jobs and growth, and to strengthen international cultural relations.

Furthermore, CE 2014-2020 contributes to the UN Sustainable Development Goal (SDG) 8 (Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all) by supporting the competitiveness of the CCS, through capacity building and skills development and through testing new business models in a rapidly evolving digital context. CE 2021-2027 contributes to various UN SDGs through several of its actions: SDG 3 (Ensure healthy lives and promote well-being for all ages) via the CCS GF ; SDG 5 (Achieve gender equality and empower all women and girls) via its cross-cutting focus on gender equality and inclusion; SDG 8 via its support for job creation, growth and investment in the European Digital Single Market and its support to CCS competitiveness; SDG 11 (Make cities and human settlements inclusive, safe, resilient and sustainable) via the synergies between the projects supported by the Programme and the New European Bauhaus; SDG 12 (Ensure sustainable consumption and production patterns) through the cross-cutting focus on greening; SDG 16 (Promote peaceful and inclusive societies for sustainable development, provide access to justice for

¹⁵ COM(2018) 267 final

all and build effective, accountable and inclusive institutions at all levels) through all the actions supporting the news media sector, and SDG 17 (Strengthen the means of implementation and revitalise the global partnership) through the international dimension of the Programme.

On the following pages are visual representations of CE 2014-2020 and CE 2021-2027 intervention logics.

Intervention logic of Creative Europe 1 (2014-2020)

Subprogramme	Needs	Specific objectives	Actions	Outputs	Results	Impact
Input : Budget + Human resources						
Culture	Develop cross-border collaboration and among CCS Develop the circulation, creation and co-creation of European (and beyond) cultural works Develop the skills and transnational mobility of cultural and creative players Increase access to a diversity of cultural content	Support the capacity of the European cultural and creative sectors to operate transnationally and internationally Promote the transnational circulation of cultural and creative works Promote transnational mobility of cultural and creative players Reach new and enlarged audiences Improve access to cultural and creative works to focus on specific groups	Support to transnational and international cooperation (projects and agreements) Support to literary translation and promotion Support to European networks of culture and creative organisations, pan-European cultural entities and Platforms for the promotion of emerging artists Special actions (e.g. cultural prizes, awards, cultural heritage)	Transnational cooperation projects supported Literary translation projects supported European networks of operators, their transnational CC projects supported Platforms, Pan European cultural entities supported Transnational mobility of artists and culture professionals supported Special actions supported	Increased capacity of CCS entities and artists to operate, create and co-create internationally Increased circulation of cultural and creative works Enhanced skills and Increased mobility of artists, CCS organisations Increased access for People to a diversity of cultural works, including from other countries than their own	Stimulated intercultural dialogue Increased international circulation and visibility of European culture and diversity Increased innovation and competitiveness of European artists and culture and creative professionals Social cohesion and inclusion European cultural heritage preserved and promoted
MEDIA	Overcome market fragmentation to increase access of European audiences to a diversity of non-national European content from across the European Union Respond to changes in international competition, technological innovations and consumer behaviour in order to reach wider audiences across platforms, notably cinema, TV, VOD	Promote transnational circulation of European AV works Strengthen the financial capacity of SMEs in the sector Help the AV sector's capacity to operate transnationally Balanced geographical coverage and sector representation	Distribution and sales of non-national AV works, promotion and marketing tools to increase prominence and visibility of AV works Horizontal support to audience development (cinemas, festivals) Horizontal support to market access/B2B exchanges Support to training Development, co-productions and TV programming (independent producers)	Increased opportunities to reach new audiences Increased opportunities to find investment/finance and buyers for AV works Training actions Works developed, coproduced and/or distributed across borders Increased opportunities for international collaborations	Diversity in European works being watched in terms of cultures, countries and languages. Capacity building through widespread international cooperation More countries in which European audiovisual works circulate More cross-border audiences for works	EU shared values and societal cohesion supported Positive contribution to an innovative EU economy Increased international visibility of European audiovisual works and professionals
Cross-Sectoral	Help close the financing gap for CCS SMEs	Improved access to finance for CCS SMEs Improve capacity of financial intermediaries to assess risks	Culture and Creative Sectors Guarantee Facility	Guarantees for loans for CCS SMEs	Increased lending for SMEs in CCS	Positive contribution to an innovative EU economy EU shared values and societal cohesion supported

Intervention logic of Creative Europe 2 (2021-2027)

Strand	Needs	Specific objectives	Actions	Outputs	Results	Impact
Input : Budget + Human resources						
Culture	Strengthen transnational cooperation and cross-border dimension of creation, circulation and visibility of European Works and mobility of operators in CCS Enhance capacity of EU CCS, including the capacity of individuals working in those sectors. Nurture talent to innovate, prosper and generate jobs. Encourage capacity building within the European CCS Contribute to the Union global strategy for international relations Increase access and participation in culture Increase audience engagement and improve audience development Promote societal resilience and enhance social inclusion and intercultural dialogue Strengthen European identity and values through cultural awareness, art, education and culture	Enhance artistic and cultural cooperation at the European level to support the creation of European works. Strengthen the external and economic dimension of Europe's CCS Strengthen innovation and mobility in Europe's CCS Strengthen the social dimension of Europe's CCS. Foster gender equality and inclusion Foster greening	Support to transnational and international cooperation Support to transnational mobility of artists Support to Networks of cultural organisations, pan-European cultural entities and Platforms for emerging artists Sectorial action (in the publishing sector, architecture, music and other sectors of artistic creation). Support to and promotion of cultural initiatives mentioned above Special actions (e.g. cultural prizes, awards, cultural heritage)	Transnational cooperation projects supported European networks of operators, their transnational CC projects supported Literary translation projects supported Transnational mobility of artists and cc professionals supported Platforms; Pan European cultural entities supported Special actions supported	Increased mobility and capacity of CCS entities and artists to operate, create and co-create internationally, digitally and in an environmentally sustainable way in a globalised market Increased circulation of artists, CCS organisations and their work Increased access for People to a diversity of cultural works, including from other countries than their own Societal challenges addressed through CE funded projects	Job creation and smart, sustainable and inclusive growth European innovation and creative economy developed and expanded Increased competitiveness of European culture and creative sectors Contribution to a shared cultural area at Union level Increased international circulation and visibility of European culture and diversity Stimulated intercultural dialogue Social cohesion and inclusion Contribution to emerging sustainable practices and to their promotion European cultural heritage preserved and promoted
MEDIA	Increase access of European audiences to a diversity of non-national European content from across the European Union Address the differences across countries regarding the production and distribution of audiovisual content Support gender mainstreaming and non-discrimination Respond to changes in international competition, technological innovations and consumer behaviour in order to reach wider audiences on all platforms, including cinema, TV, VOD but also video games and virtual reality. Support to be scaled up in order to compete with giant global players Third countries to align with the AVMS Directive as appropriate	Promote transnational circulation of European AV works Nurture talent, competence and skills in the creation of works Promote cross-border innovation Promote transnational circulation of European AV works Encourage cooperation across Member States, including with different audiovisual capacities in the creation of works	Distribution and sales of non-national AV works, promotion and marketing tools to increase prominence and visibility of AV works Horizontal support to audience development, including a cinema network, festivals and independent VoD services Horizontal support to market access Support to major industry hubs Training Innovative tools and business models Development of AV works by independent AV companies, including specifically international co-development Development of works from low-capacity countries Production of works for TV/VOD by independent production companies Networks of audiovisual professionals Policy actions, including collaboration with the European Audiovisual Observatory	Increased opportunities to reach new audiences Increased opportunities to find investment/finance and buyers for AV works Training actions Innovative tools supported to help produce or distribute audiovisual works Works developed, coproduced and/or distributed across borders Increased opportunities to reach new audiences Increased opportunities for international collaborations	Diversity in European works being watched in terms of cultures, countries and languages International cooperation more widespread, transnational, European scale economic activity Better skilled workforce to deal with changes in the sector More countries in which European audiovisual works circulate More cross-border audiences for works Diversity in European works being watched in terms of cultures, countries and languages	EU shared values and societal cohesion supported Positive contribution to an innovative EU economy Increased international visibility of European audiovisual works and professionals
Cross-Sectoral	Adaptation of CCSs most disrupted by digital transformation/online platforms News media to adapt to economic and technological shifts to ensure viability Citizens need access to trustworthy information, including at local level	Support innovative approaches to creation, distribution and promotion of content Enhance a free, diverse and pluralistic media environment and media literacy	Support to innovation projects covering more than one CCS Support cross-border collaborative journalism and quality content Independent monitoring of risks Promote media literacy	Innovative tools (e.g. software) fostering creation, distribution or promotion of cultural content Journalism partnerships Media pluralism Monitor Materials and tools and capacity building actions for improving media literacy	More resilient and innovative CCS Free, diverse, pluralistic media environment strengthened	Positive contribution to an innovative EU economy EU shared values and societal cohesion supported Democracy in Europe supported

Programme design

The Programme is divided into three strands: (i) the Culture strand, which covers cultural and creative sectors apart from the audiovisual sector; (ii) the MEDIA strand, which covers the audiovisual and gaming sectors; and (iii) the Cross-Sectoral strand, which covers actions across all cultural and creative sectors with a particular focus on the news media sector.

CE 2014-2020 was established by Regulation 1215/2013 and the successor Programme CE 2 (2021-2027) was established by Regulation (EU) 2021/818. The latter brought had the same general objective and built on the previous experience, also taking into account the need for EU intervention in the audiovisual sector to accompany the Union's Digital Single market policies. DG EAC is the Commission's department in charge of cultural policy, while DG Communications Networks, Content and Technology (CNECT) is responsible for the interrelated regulations, policies and programmes concerning audiovisual and media. While DG EAC was the leading department for the management of CE 1, the **two DGs co-manage CE 2**. For its two iterations, the Programme has been directly implemented by EACEA.



* In addition to Culture Moves Europe, implemented by the Goethe Institut, MediaInvest is also implemented through indirect management by EIF as a blending facility with InvestEU.

Creative Europe is open to the participation of non-EU countries indicated in the corresponding Regulations, providing specific conditions are met. 13 countries are currently associated to CE2: EEA/EFTA countries (Iceland, Liechtenstein and Norway), Albania, Armenia, Bosnia and Herzegovina, Georgia, Kosovo¹⁶, Montenegro, North Macedonia, Serbia, Tunisia and Ukraine. In CE1, Türkiye participated until its departure in 2017. Moldova participated in CE1 (fully in Culture and partially in MEDIA) as of 2015 and until the end of the programming period. The European Commission and Moldova signed an Association Agreement on 2 September 2025, which foresees the country's participation in the Culture strand of Creative Europe as of 2026. Participation in the MEDIA strand is contingent upon Moldova's alignment with the AVMS Directive.

2.2. Points of comparison

Based on the positive conclusions of the midterm evaluation of Creative Europe 1, Creative Europe 2 represents an evolution rather than a revolution. It builds on the strengths of the previous support measures, while introducing some key improvements and innovations. In particular, Creative Europe 2 recognised that the digital shift represents a paradigm change for cultural and creative sectors, with new opportunities for the creation and distribution of European works, including access, which benefits European society as a whole.

The overall Programme budget was significantly strengthened to reach EUR 2.5 billion for the 2021–2027 period, i.e. an 66% increase compared to the previous programming period (2014–2020). The increase was intended to allow the Programme to improve responses to the challenges faced by the CCS and improve support to high-quality projects that have consistently been proposed.

Culture Strand:

In **Creative Europe 1**, the Programme initially featured two key performance indicators related to i) the overall reach of the actions supported by the strand and ii) the number of projects addressed to young people and under-represented groups and the reach of these projects. The objectives set at the beginning of the MFF for these indicators were reached in both cases. However, as commented above, the Programme introduced, through a delegated act in 2019, a series of additional indicators to better capture the performance of the Programme in line with its intervention logic. In the Culture sub-Programme, 9 additional sub-indicators were added to capture data beyond Programme's visibility. These indicators concerned the support to artists and cultural professionals, the general public and organisations (as well as their size) reached by the Culture sub-Programme. The objective to reduce societal challenges through Culture was addressed through an indicator to capture the number of projects supported by the Programme addressed to disadvantaged groups. In relation with the objective of international cooperation and internationalisation of careers to increase the capacity of the CCS to operate internationally, the number of cultural and creative activities organised with the Culture sub-Programme's support have been integrated as a key-performance indicator. The specific objective of support to the circulation of European literature and contribution to linguistic diversity was also

¹⁶ This designation is without prejudice to positions on status, and is in line with UNSCR 1244 and the ICJ Opinion on the Kosovo declaration of independence.

addressed through three key performance indicators introduced in 2019 on i) the number of literary translations undertaken per year; ii) the number and percentage of translations from lesser-used languages and iii) the number of books produced with the support of the Programme. Finally, a specific indicator was set on the sub-Programme's main action, the support to Cooperation Projects, through a specific indicator to capture the number and relative share of small-scale and large-scale cooperation projects. As the new Key-Performance indicators were introduced late in the last budget cycle, no baseline and objectives were set for this new set of indicators. The detail of the results by these indicators is found in Annex VII of this SWD.

In **Creative Europe 2**, the Culture strand now features a series of 5 indicators to capture the Programme performance. The number of transnational partnerships created with the support of the Programme allow to capture the number of organisations and projects supported through the Programme, indiscriminating of the action. The transnational mobility of artists and cultural and creative professional is also captured by a specific indicator which amalgamates results of Culture Moves Europe, as well as the one assessed by projects during their final evaluation. The objective to address societal challenges through Culture-funded projects is also assessed by a specific indicator on the number of projects addressed to socially marginalised groups. The visibility of the projects funded under the Culture strand, also present in CE1, keeps on being monitored in CE2, through a specific indicator on the number of people accessing European cultural and creative works generated by the Programme. Finally, in line with the ambition of the Programme to contribute to international relation, stimulate intercultural dialogue and increase international circulation and visibility of European culture and diversity, the number of projects that involve an organisation based in a third country is now assessed through a dedicated indicator. All indicators are on track to meet their target by the end of the budget cycle, except for the visibility action which has been estimated at a too large number, which should be revised. If CE1 indicator foresaw a reach to 7 million citizens by the end 2020, the CE2 the target by 2027 is of 552 million individuals reached. Taking into account the budget increase from CE1 to CE2 and the number of 90 million individuals by the 2014-2020, a target set at 160 million individuals reached by the activities supported by the Programme appears more realistic. The Section 5.2.2 ("Lessons learned") outlines how the Commission plans to improve the data collection strategy and the monitoring system.

MEDIA and Cross sectoral

The MEDIA strand has been strengthened by focusing on cross-border collaboration and co-productions in order to scale up companies. It also responds to new trends in the industry, such as the growth in cross-border audiences for high-quality TV series and the emergence of virtual reality (VR) and digital innovation. Its market research activity has been expanded.

The Cross-sectoral strand incorporates significant changes to reflect the new objectives. For the first time, structured support is given to the news media sector to accompany its transformation in the digital age and strengthen media freedom and pluralism. A new Creative Innovation Lab now supports cross-sectoral innovation. The CCS Guarantee Facility (CCS GF) financial instrument has been integrated within the new InvestEU Programme.

The points of comparison for MEDIA include the official monitoring indicators, but these were supplemented with additional indicators for the purposes of carrying out this evaluation. The latter were possible due to the availability of external data. This is further

explained under section 4.1.2. Remaining data gaps are indicated, and possible new indicators are put forward under Section 4.1.2 and 5.2.

The assessment of the cross-sectoral strand and financial instruments uses as a basis mainly the official KPIs, but data gaps and possible future indicators are also identified for these.

3. HOW HAS THE SITUATION EVOLVED OVER THE EVALUATION PERIOD?

This chapter describes the state of play in implementing Creative Europe 1 and 2 Programmes, explaining the situation during the evaluation periods both legally and on the ground.

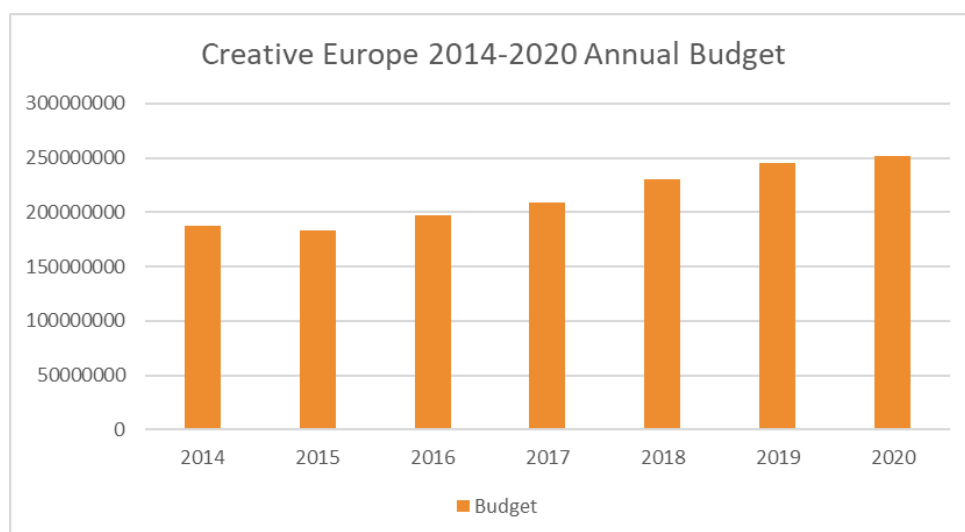
Creative Europe 1

Creative Europe 1 was designed with a budget of EUR 1.46 billion. The budget was divided between the two different Sub-programmes and the Cross-sectoral strand as follows: at least 56% for the MEDIA Sub-programme, at least 31% for the Culture Sub-programme, and a maximum of 13% for the Cross-sectoral strand. Compared with the budget indicated in the legal instrument, the Creative Europe 2014-2020 financial programming was increased by 2.7% to reach EUR 1.5 billion.

Strand	2014-2020
Culture (million EUR)	440
MEDIA (million EUR)	775
Cross-Sectoral (million EUR)	184
Administrative and EACEA	102
All strands (million EUR)	1,501

The Creative Europe 1 budget remained relatively stable in the first two years of its implementation and increased slightly every year, from 2016 until 2020.

Over the course of the CE 1 period, approximately 30,000 applications were submitted to



155 calls for proposals and led to the funding of 14,828 projects. The number of projects funded under the MEDIA Sub-programme was considerably higher than those under the other strands, with a total of 13,549 projects. The Culture Sub-programme supported 1,213 separate projects that involved 4,375 beneficiary organisations. The Cross-sectoral strand financed a total of 66 distinct projects, including 38 Creative Europe Desks.

In line with the composition of the CCS, the majority of the support provided by the different strands of Creative Europe has been redistributed to small and medium-sized

entities. In the MEDIA Sub-programme, 99% of the direct beneficiaries were SMEs (reflecting the 99% of SMEs amongst European AV enterprises), of which 25% were small and nearly 70% micro. Micro and small organisations accounted respectively for 50% and 40% of the total value of grants under CE 1.

Following the UK's 2016 vote to leave the EU, the UK left the EU on 31 January 2020. Although potentially eligible to join as a third country in Creative Europe 2, the UK chose not to make use of this possibility, leading to the closure of the UK Creative Europe desk. The UK CCS had been major beneficiaries of Creative Europe: between 2014 and 2019, the UK was involved in 609 cultural projects, which received EUR 100 million from the Programme. Türkiye joined CE1 but decided to suspend its participation in the Programme in 2020. All in all, 15 non-EU countries participated in CE1: Albania, Armenia, Bosnia and Herzegovina, Georgia, Iceland, Kosovo, Liechtenstein, Moldova, Montenegro, North Macedonia, Norway, Serbia, Tunisia, Türkiye and Ukraine. In total, 1,347 projects involving 561 organisations from these countries were supported under CE1. The wide participation of third countries to the Programme is a very positive aspect of the Programme as it contributes to the EU efforts for cultural diplomacy by creating tangible ties with these countries. For countries on the path to EU accession, their participation in Creative Europe is a positive aspect in relation to Chapter 26 of the *Acquis Communautaire* on Education and Culture. As regards audiovisual, alignment of third countries with the Audiovisual and Media Services Directive is an ex-ante condition for participation in the MEDIA strand, thus acting as an incentive to adopt EU standards.

The COVID-19 pandemic led to widespread lockdowns in Europe, severely impacting cultural venues and the CCS, which were among the hardest hit. For example, cinema operators in the EU reported a 70% drop in box-office sales in 2020, music venues reported a 76% drop in attendance (64% in revenues) and museums lost 75-80% of their revenues (in popular touristic regions)¹⁷. In response, the Programme supported the launch of the online platform Culture Unite in May 2020 and the set-up of Perform Europe to support circulation in the performing arts sector.

Creative Europe 1 was initially monitored through 18 indicators set in its legal base. These were completed by further 24 indicators introduced in the Commission Delegated Regulation (EU) 2019/1974 of 17 May 2019 supplementing Regulation (EU) No 1295/2013. The original indicators did not allow for a comprehensive monitoring of the Programme's progress and performance towards the set objectives, as a limited number of these indicators would qualify as results or impact indicators¹⁸. The list of indicators, as well as the results gathered, are found in Annex VII.

Creative Europe 2

Creative Europe 2 was designed with a budget of EUR 2.5 billion in the MFF 2021-2027, representing a 66% increase compared to the earlier programming period. This has allowed for greater reach and impact within the CCS. In addition, compared to the budget indicated in the legal instrument, the Creative Europe 2021-2027 financial programming has been increased so far by 1%.¹⁹

The budget was divided as follows:

¹⁷ Annual Single Market Report 2021 SWD(2021) 352 final, 5.5.2021

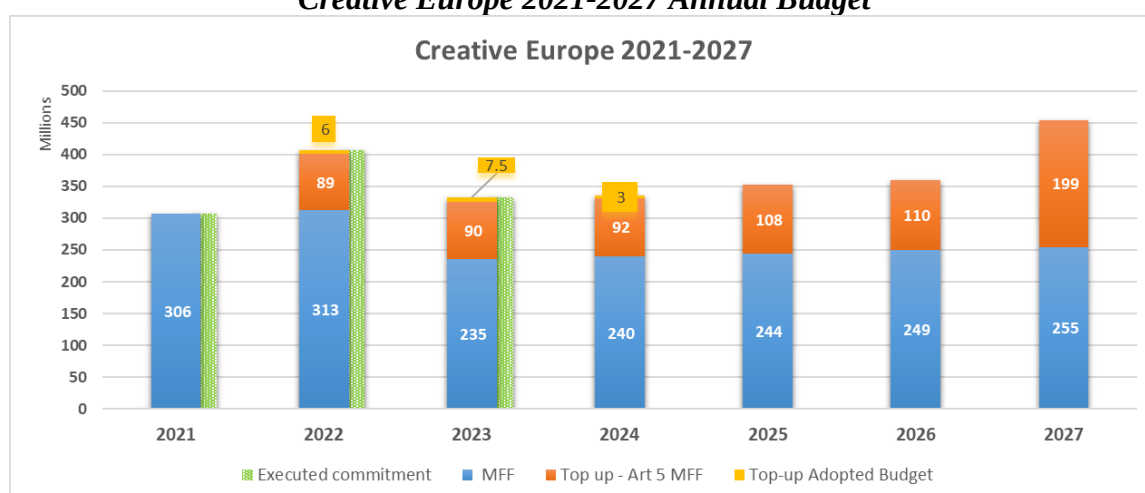
¹⁸ Commission Delegated Regulation (EU) 2019/1974 of 17 May 2019 supplementing Regulation (EU) No 1295/2013

¹⁹ Additional funding were attributed to the 2022 and 2023 CE budget following by the European Parliament.

Strand	2021-2023	2021-2027
Culture (million EUR)	328.3	790.8
MEDIA (million EUR)	569.6	1,378.9
Cross-Sectoral (million EUR)	90	214.2
All strands (million EUR)	1,045.7	2,546

The overall budget was frontloaded, with a third of the budget committed in the first 2 years of the Programme, in order to address the difficult situation of the CCS hit by the COVID-19 crisis. In 2022, Creative Europe 2 benefited from an overall increase close to EUR 100 million compared to 2021, representing a budget increase of 33% compared to the previous year. Following the financial programming profile, the annual budget for Creative Europe 2 returned in 2023 to the regular profile and is programmed to have a steady but low growth until the end of the Programme cycle in 2027.

Creative Europe 2021-2027 Annual Budget



Source: Creative Europe Spending Review, 2024

98 calls for proposals have been launched so far under Creative Europe 2, which led to the selection of 2,588 projects involving 2,566 organisations. Over this period, EUR 877 million were disbursed: EUR 483 million under the MEDIA strand, EUR 283 million under the Culture strand and EUR 82 million under the Cross-sectoral strand.

Similarly to the previous Programme, the majority of the organisations that benefitted from Creative Europe 2 are small and medium-sized organisations. The profile of the beneficiaries of CE2 remained the same as for CE1.

13 of the 15 third countries participating in CE 1 decided to renew their participation under CE 2 and Moldova is expected to participate in the Programme as of 2026. From 2021 to 2023, Creative Europe 2 supported 418 projects that involved 415 organisations from third countries associated to the Programme. Among these projects, 227 are led by an organisation located in one of these countries.

In February 2022, Russia's war of aggression in Ukraine further disrupted the CCS, particularly in neighbouring countries, and prompted shifts to support Ukrainian cultural actors and counteract the wider regional instability. Among other measures, one of the

most ambitious Creative Europe actions to date was the dedicated call for proposals to support the Ukrainian CCS launched in November 2022 under the Culture strand with a EUR 5 million budget.

Altogether, Creative Europe 2 has a list of 15 key performance indicators: 13 of them are divided by strands, while two encompass the whole Programme. The indicators are listed in Annex VII.

Culture Strand

Between 2021 and 2023, the **Culture** strand supported a total of 630 projects, redistributing EUR 294 million to 2,176 organisations. These included 432 European Cooperation Projects involving 1,978 organisations across 39 countries. Over 1,500 books from 1,200 authors were translated with the help of more than 1,000 translators. The Programme also facilitated the establishment of 37 European Networks representing over 4,000 cultural and creative organisations and supported 16 Platforms gathering 299 organisations for the support of young emerging artists. Additionally, the strand supported four orchestras under its Pan-European Cultural Entities scheme. The last two actions together benefit 3,875 emerging artists and act as an accelerator for their careers. As a novelty in the Programme, the Culture Moves Europe mobility scheme, with a budget of EUR 21 million in the 2022-2023 period, supported the mobility of 3,049 artists and the creation of 202 artist residencies accommodating 772 individual artists. Moreover, the Programme supported annual prizes in literature, music, architecture, and cultural heritage, and provided financial support to the European Capitals of Culture and the networking of the European Heritage Label sites. It also developed a new sectoral approach to better target specific cultural and creative sectors, particularly music, books & publishing, architecture, and cultural heritage, aligning funding with policy initiatives.

Despite its significant achievements, the Culture strand faces oversubscription issues, leading to fierce competition for available funds. The European Cooperation Projects scheme saw its success rate falling to just 26% in 2022, despite receiving in this same year the highest budget ever, i.e. EUR 69 million. The number of applications continues to rise, illustrating the sectors' strong interest in, need for, and perceived value of the Programme; for example, submissions for European Cooperation Projects increased from 431 in 2021 to 863 in 2023 (i.e., a 78% increase). Out of 2,518 proposals received in the Culture strand over these years, 658 high-quality projects had to be rejected due to insufficient funds, 488 of which were for European Cooperation Projects. To counteract these oversubscription issues, measures to improve success rates were introduced in the Annual Work Programme 2024 onwards, in particular the capping of the number of projects individual organisations that could participate in. In addition, calls for large-scale cooperation projects are now published every second year, to allow for the selection of a higher number of smaller-scale projects for the same amount of budget in years when there are no large-scale projects. This choice was made to favour high quality medium-scale projects, which often suffered from a low success rate due to limited budget. It also aimed at enhancing inclusivity and helping smaller entities facing more difficulties to act on a European level. Indeed, smaller-scale projects allow to promote the access of grassroots organisations and support them in the creation of new partnerships and development of new activities and innovative ideas. It aligns with the objective of CE2 to increase inclusivity, competitiveness and scalability. It is also a way to help smaller countries with smaller organisations to get access to the Programme, as predominantly well-established European organisations tend to participate in large-scale.

MEDIA strand

There were no major changes in the allocation of support for main objectives between CE1 and CE2, but the increased focus of CE2 on competitiveness is visible in the budget. The total grants awarded under CE1 amounted to EUR 775 million. At EUR 663 million, the total grants awarded by end 2024 under CE2 are already close to the entire CE1 budget. This is thanks to the increase in the overall budget under CE2. Despite a reduction of actions from 18 to 14 and some changes in certain actions, the overall objectives of support remained the same. Support under MEDIA can be broadly classified under two types of support: support to individual audiovisual works (for the development and/or production and/or distribution of films and series) and horizontal support aimed at developing audiences (B2C activities, like cinema networks and festivals showing non-national European works) or improving the competitiveness/business capacity of the European audiovisual sector (B2B activities, like markets, training or supporting innovation). Support to individual works amounted to 63% of CE1 grants and, 60% of grants awarded under CE2 as of end 2024. Support for content creation and distribution is roughly equally represented under both CE1 and CE2. Support for B2B business activities has increased from 14% to 20% of the budget under CE2, reflecting the increased focus on this area in the legal base. The increase was achieved by a slight decrease in the share of funding for horizontal audience development (from 23% to 20%) and Distribution-related funding (from 30% to 27%).

Support focused on individual works accounts for the overwhelming majority of supported projects, as can be expected from the nature of these grants. 12,104 projects were supported under CE1 and, as of end 2024, 2,765 under CE2. 90% of the projects funded under CE1 and 80% funded under CE2 thus far were for the content creation and distribution of individual audiovisual works, while the remaining projects were roughly equally distributed among the two sets of horizontal actions (audience and business-focused). The average size of the grant increased significantly for all the four objectives (content creation, distribution, horizontal audience development and horizontal business development).

Success rates can be very low for certain actions but improved under CE2. The average success rate under CE1 was 48% but showing a great degree of variation between 19% (single project development and video games development actions) and 100% (cinema networks, which had one single beneficiary, Europa Cinemas.) Automatic distribution support also pushes the average up significantly. Under CE2 the average success rate increased to 53%, but the success rate remained below 30% for a number of actions, mainly under content creation support for development.

Cross-Sectoral strand

The cross-sectoral strand has evolved significantly over the two Programmes. The Cultural and Creative Sectors Guarantee Facility was successfully funded over 2016-20 and was then integrated into Invest EU as of 2021. The total amount of funding allocated was EUR 236.9 million of financial commitment, which led to 22 financial intermediaries signing guarantee agreements with the EIF.

In the current Programme a new set of actions was introduced in support of the news media to accompany its transformation in the digital age and strengthen media freedom and pluralism, with a small annual budget of about EUR 15 million. Applications rose from 30 in 2021 to 106 in 2023 and the success rate therefore declined from the success rate is 18.5% to 10% in 2023.

A new Creative Innovation Lab was introduced in 2021 to support cross-sectoral innovation. By 2023 projects were awarded a total of approximately EUR 20,500,000 at an average of EUR 624,000 per project. In 2021, only 10 out of 43 proposals met the evaluation threshold, but subsequently the quality improved. There was a rise in applications from 43 in 2021 to 101 in 2023 and the success rate declined sharply from 23% in 2022 to 6% in 2023.

CE Desks

The total amount of funding allocated to the Creative Europe desks in the first three years of the 2021-27 Programme was EUR 18,030,690, which was equivalent to an average of EUR 6,010,230 per year. This compares to total funding of EUR 36,361,230 in the 2014-2020 Programme at an average of EUR 5,194,461 for each year. The rise in the annual budget for the Desks appears to be reasonable considering the high rate of inflation in the 2021-23 period. The volume of support required from desks, including the size and number of applications and subsequent beneficiaries, has increased, whilst a much greater proportion of smaller projects were supported in the previous Programme (particularly under the MEDIA Sub-programme).

4. EVALUATION FINDINGS (ANALYTICAL PART)

4.1. To what extent was the intervention successful and why?

This section will assess the implementation of Creative Europe based on the following aspects: effectiveness, efficiency and coherence. The assessment will be made separately for the MEDIA strand (audiovisual and video games), the Culture strand (all other cultural and creative sectors), the Cross-sectoral strand (news media, Creative Innovation Labs, Creative Europe desks). Financial instruments (Cultural and Creative Sectors Guarantee Facility and MediaInvest) will be assessed separately because of their specificities. The section will close with a common assessment regarding administrative expenses and burdens relating to the implementation of the entire Programme.

4.1.1. MEDIA

Effectiveness

Audiovisual sector

MEDIA supports activities across the audiovisual value chain. The audiovisual value chain is composed of authors (directors, screenwriters, actors), production companies, B2B distributors (sales agents, distributors) and B2C distributors (cinemas, broadcasters, streamers). Other actors, including film festivals and film markets, may combine B2B (market, training) and B2C (film screenings) activities. MEDIA support focuses on content creation, distribution and (mainly theatrical) exhibition, with direct support to these activities. The remaining actions (e.g. relating to markets, innovation and training) indirectly support these activities. This assessment will focus on the core areas of funding.

The section will analyse the effectiveness of MEDIA based on the main specific objectives for CE1 and CE2, as outlined in Section 2.1 (intervention logic) which respond to the main needs and dual objectives, namely cultural diversity and competitiveness. In particular:

1) Boost the transnational circulation and audiences of European AV works²⁰ (relevant for both cultural diversity and competitiveness) – This is explicitly stated in the specific objectives under CE1 in particular²¹; and is implicit in the specific objectives of CE2

2) As regards competitiveness, the CE2 legal base has more elaborate objectives, i.e. to promote ‘*the competitiveness, scalability, cooperation, innovation and sustainability including through mobility*’²² of the audiovisual sector. The CE1 regulation simply refers to strengthening the financial capacity of SMEs in the cultural and creative sectors.

3) The legal bases for both iterations of the Programme point to a European added value in levelling the playing field among countries. Balanced geographical representation appears as a specific objective in the CE1, but not in the CE2 legal base (where it is nevertheless mentioned as a priority).

Points of comparison specific to MEDIA:

CE1 set a number of sector/market-wide indicators relating to the transnational circulation/external dimension of supported activities under MEDIA. These responded to the need to make EU content travel better across borders. This need persisted across both Programmes. For example, in theatrical exhibition, where we have data as of 2014, tickets sold for non-national EU27 content amounted to a relatively small and declining share of all admissions in Europe: 7.5% in 2014 (baseline CE1), 7% in 2020 (final result and baseline CE2) and 6% in 2023 (mid-term result of CE2). The indicators set for the CE1 Programme to respond to this need were as follows: 1) the number of admissions to non-national films in Europe in cinemas; 2) the number of admissions to European films worldwide in cinemas; 3) percentage of European AV works in cinemas, on TV and on digital platforms; 4) number of people in Member States/participating countries having access to non-national audiovisual works; 5) number of video games produced in Member States/participating countries (turnover was used as a proxy). As detailed in Annex VII, targets were met in the case of 1-3, but not for 4 and 5. Not meeting the targets for 4), while meeting 1-3 may already suggest that attracting audiences to European works is a challenge additional to making such works internationally available (e.g. screen them in theatres, broadcasting them on TV and/or getting them into video-on-demand catalogues).

On the basis of the mid-term evaluation, the indicator framework was amended. This was because market-wide indicators are affected to a substantial degree by factors outside of the MEDIA strand/Sub-programme (e.g. investments by US studios), which limits their usefulness as monitoring indicators for the success of the Programme. The mid-term review of CE1 therefore identified more targeted KPIs, which were subsequently adopted by a Delegated Act in May 2019²³. The new corresponding indicators were set as number of admissions in the Member States for films from other Member States distributed in the Union with the support of the Programme; share of admissions in the Member States for

²⁰ If not otherwise indicated, ‘European AV works’ refers to films and series (both including the main genres of fiction, animation and documentary) produced by one of the European countries affiliated to the MEDIA Programme. As this has changed over time, data for any given year needs to be interpreted as including all affiliated countries in that given year.

²¹ Art 4a and 4b

²² Article 3.2) b of the CE 2 Regulation.

²³ COMMISSION DELEGATED REGULATION (EU) 2019/1974 of 17 May 2019 supplementing Regulation (EU) No 1295/2013 of the European Parliament and of the Council by establishing additional qualitative and quantitative performance indicators

films from other Member States; average number of non-national countries in which the supported works have been distributed. Given the late stage of Programme implementation, no targets were set for 2020. However, successive monitoring reports²⁴ provided the state of play as of 2020. Based on the data provided, works receiving support generated 136 million cross border viewers in 2020. In 2020 on average 6% of films shown in cinemas in Member States originated from other Member States, and supported films were distributed in 4.5 countries on average. No corresponding data was provided in a systematic way for TV broadcasts, because the granting period would often end before TV release and there is no public regular TV viewership database available.

As regards transnational circulation aspects of the Programme's objectives, CE2 retained one of the indicators identified in the mid-term review of CE1. This was the number of people accessing MEDIA supported European works from other participating countries. The other indicators were not included in the legal base, following negotiations with the co-legislators and in line with horizontal guidelines to base reporting mainly on data coming from beneficiaries, reduce the number of indicators and give preference to indicators which reflect horizontal priorities of all programmes. The Programme is on track to achieve the 2027 target for cinema admissions to non-national supported works of 93 million over 2021-2027 (with 18 million viewers in 2021-2022 alone, with some project data still to arrive).

Finally, the mid-term review introduced a more qualitative indicator to monitor the transnational cultural impact of supported works. This concerned the recognition received by supported works at major festivals and awards of international standing (such as Berlinale, Cannes, Academy Awards and European Film Awards). However, no targets were identified, and the indicator was not retained for CE2 as these were not compatible with the horizontal guidelines for setting indicators (the festivals included could change over the years). Between 2017 and 2020, supported films won 165 major awards and prizes were given to supported films. For the purposes of this evaluation, it was calculated that between 2014 and 2024, 299 MEDIA-supported works received prestigious international awards. In total there have been 1077 nominations, 458 awards, and a further 25 selections and honourable mentions.

As regards competitiveness, there were no audiovisual-specific indicators set originally for CE1 for the specific objective of strengthening the financial viability of SMEs in the creative and cultural sectors, because of the challenges to systematic monitoring. Following the mid-term review two indicators were introduced, but no targets were set: 1) number/share of audiovisual companies who report an improved market position due to MEDIA support; and 2) number of co-productions created with the support of the Programme, including co-productions with diverse partners. The latter relates to the objective of levelling the playing field. Between 2014 and 2020 388 intra-EU co-

²⁴ <https://digital-strategy.ec.europa.eu/en/library/reaching-audiences-across-borders-media-launches-its-monitoring-report-2017>; <https://digital-strategy.ec.europa.eu/en/news/creative-europe-publishes-its-monitoring-report-2018>; <https://op.europa.eu/en/publication-detail/-/publication/f16e7fc0-ecc3-11ea-b3c6-01aa75ed71a1/language-en>; <https://op.europa.eu/en/publication-detail/-/publication/49a05a63-1b4d-11ec-b4fe-01aa75ed71a1>; <https://op.europa.eu/en/publication-detail/-/publication/6bdeb04d-7ec4-11ee-99ba-01aa75ed71a1>

productions were supported in development and production (accounting for 86% of TV and film projects supported).²⁵

The indicators introduced under CE2 to measure competitiveness represent an evolution of the indicators introduced following the mid-term review of CE1. While the number of co-productions was retained, it was complemented also by the overall budget of supported co-productions. The Programme is on track to achieve the 2027 target. Based on already available data that in the years 2021-2023 there were 1,633 co-productions supported out of expected 3,000 over the years 2021-2023 (and some data from 2023 is yet to arrive). The success of B2B actions related to markets and training is measured by two indicators: 1) Number of people reached by B2B promotional activities in major markets and 2) Number of participants in learning activities who assess they improved their competences and increased their employability. This indicator also introduced a diversity-related sub-indicator, namely the proportion of women who positively assess the impact of the activities. The Programme is on track to achieve the target indicator for learning activities: including the baseline of 2,200 in 2020 the Programme has already reached 23% of the 15,760 target for 2027 in its first two years, while the target of 55% women who assess the activities positively has been exceeded in the latest data available for 2022 (59%). However, the target of 1.8 million for the second indicator may not be reached as it turns out that lockdowns might have long-term impacted the events sector, which do not attract the same scale of visitors as before COVID, when the target was set.

Finally, as regards the level playing field, CE2 retained the indicator on co-productions involving a low-capacity country and added an indicator in the share of supported works in lesser used languages. These are languages other than English, German, French, Italian, Spanish. The data available by 2025 (only around 20% of applicable projects yet) indicates that this indicator is on track. In 2020-2021 there were already 528 films supported out of 2845 expected over 2021-2027.

Overall, this interim evaluation has shown that the monitoring framework for the two iterations of the Programme is not sufficient to fully assess the impacts of the Programme. The pre-2018 CE1 indicators are too wide and not linked sufficiently to the programme and targets are missing for the indicators introduced after the mid-term review. While the indicators introduced under CE2 do have targets and relate to Programme outputs, they are still missing some data which would allow to draw wider conclusions. Also, there is no perfect way to set targets, as these can be always seriously affected by external impacts, even if they are closely related to the objectives (like e.g. less participation in physical events or new type of data becoming available only during the period). The nature of sources which could be used in official indicators is also limiting (mainly because many interesting data about the results of the support become available only after the support period is over).

Also, the indicators under CE2 do not comprehensively cover all Programme actions and impacts. The KPIs do not cover the performance of supported works in broadcasting sector (TV views and broadcasting time) which accounted for between 75-86% of all revenues in the audiovisual sector. Neither do they cover the performance of supported works in the increasingly important streaming sector (which grew its AV market revenue share from <1% to 16% since 2014 and drives all growth in the sector). The current evaluation therefore attempts to provide a wider set of indicators and benchmarks to

²⁵ EACEA project monitoring data

address the shortcomings of the monitoring framework. This is in particular the case with the counterfactual analysis carried out for the specific objective of transnational circulation and consumption of supported works. The current evaluation could benefit from an expanded set of detailed market data on the availability and audiences of European AV works.²⁶ Crucially, the counterfactual analysis could therefore also cover better the broadcasting and Video-on-Demand ('VoD') segment (includes mostly streaming, but also online rentals and purchases of films and series), which together accounted for over 90% of all EU audiovisual sector revenues in 2023²⁷.

Under the 'Lessons learned section', proposals will be made for further possible indicators to complement the current framework with a view to the final evaluation of CE2. Whilst all the indicators may not be included in the legal basis they could be monitored independently by the Commission.

²⁷ Not including video-sharing platforms and video content on social media

In line with the overall objectives outlined in CE1 and CE2 a counterfactual analysis²⁸ tested the core research questions based on Programme objective relating to transnational circulation and audiences: whether MEDIA funding for the creation (development and/or specific works was associated with 1) improved non-national circulation of the works in Europe (cinema, TV, VoD); and 2) a higher non-national consumption of European AV works outside the country of origin (cinema, VoD).²⁹ The counterfactual analysis covered actions supporting individual films and series under CE1 and CE2. Across both Programmes, until 2023, MEDIA has supported a total of 7887 original unique audiovisual titles (films and series) of which 5,216 were supported through content creation actions (development and production), and 2,671 through distribution-related actions. These types of support accounted for almost two thirds of the budget and 90% and 80% of the supported projects under CE1 and CE2 respectively.

The counterfactual analysis showed a strong positive association between MEDIA funding and the non-national circulation of EU AV content³⁰ across all three main exhibition channels, namely cinema, TV and VoD. The positive impact of support can be observed under CE1 and CE2, for both content creation and distribution support, while the impact for CE1 is stronger and the results are more robust from a methodological perspective. This is not surprising as both Programmes provide development, production (only TV and online content) and distribution/promotion support for films and series with a focus on cross-border potential, while the sample for CE2 is significantly weaker due to the time delay of impact and due to external shocks (for example COVID reduced cinema admissions by at least 70% in the first year of lockdowns).³¹

- **Cinema:** MEDIA supported films³² are associated with a release in an additional 6.55 more non-national countries, when compared to non-supported films (estimated at 1.1 countries) This amounts to 86% of all the average non-national circulation of supported films (measured as the total number of non-national countries supported films circulate in). Under CE1 MEDIA funding is associated with an additional 6.89 non-national countries, with a corresponding figure of 5.45

²⁸ Full details of this analysis can be found in the supporting study to the evaluation, in particular Annex VIII.

²⁹For TV, consumption (viewing) data was not available at a sufficiently granular level (title-by-title of European films and series) to allow for a counterfactual analysis.

³⁰For reasons of simplicity, comparability across the 10 year period and two Programmes, and due to resource limitations, the counterfactual analysis behind the results presented in these paragraphs covered series produced in the current 27 Member States of the EU and films produced in a sample of 12 Member States (FR, IT, FI, BE, HR, PT, PL, RO, LT, BG, HU, SK). The sample is diverse in terms of the size and audiovisual capacity, population, geographic location and cultural and linguistic profile of the countries. The results could therefore be applied as a good proxy for the overall impact of the Programme.

³¹Annual Single Market Report, 2021

³²Based on all films that received either development or distribution support and were produced in one of the 12 sample countries.

under CE2. This amounts to an 88% and 80% contribution to the number of non-national countries a supported film circulates in under CE1 and CE2 respectively.³³

- **TV:** MEDIA supported films and series³⁴ were broadcast in 15.4 non-national countries on average (17.1 under CE1 and 5.9 under CE2), 9.2 countries more than comparable unsupported EU works across both Programmes (unsupported works were broadcast on average in 3.9 countries under both CE1 and CE2). Adjusting for relevant characteristics,³⁵ MEDIA support was associated with broadcast in an additional 9.5 countries on average during CE1 and CE2 combined (10.6 and 3.3 for CE1 and CE2 respectively).³⁶
- **VoD:** In 2024 MEDIA supported films and series were available in VoD catalogues in around 9 non-national countries under both CE1 and CE2 respectively. Non-supported EU works released during CE1 and CE2 respectively were available in around 5 countries on average (again, no meaningful difference between the two Programmes). Adjusting for relevant characteristics, MEDIA support resulted in VoD availability of films and series in an additional 3.2 countries on average for the combined period (2.8 under CE1 and 3.7 under CE2).
- **Series supported for development and/or under TV/online actions.** The counterfactual analysis also confirmed the positive impact of development and/or production support for the cross-border circulation of series separately. Support for series is associated with a significant number of additional countries in which a series is accessible (5.95 additional countries in which a series was on average available on TV and 2.68 additional countries in which a series was available in at least one VoD catalogue).³⁷ Looking at series separately also confirms that MEDIA content creation funding (development and/or production) alone also has a significant positive impact on the circulation of works across Europe. The transnational circulation potential of works supported from the content cluster is an integral part of the selection criteria in the relevant calls and the above results suggest that these criteria do have a positive impact on transnational circulation in practice.

³³ The impact was more pronounced for films supported under CE1 most likely because of Covid lockdowns affecting cinema attendance and a small sample available post 2020. Distribution data is calculated for 27 Member States due to the easy matching between Programme data and external databases.

³⁴ Combining films produced in one of the 12 sample countries and series produced in one of the 27 member States receiving support under either of the development, TV/online or distribution actions.

³⁵ Based on a propensity score analysis taking into account all characteristics where sufficient data was available in both the monitoring and external databases, namely primary production country, production year, number of production countries, AV work type (film, series); whether the US was one of the production countries. As regards genre, while an important variable, the data available for the comparison (unsupported) group was not sufficient to make robust finding, so it is not included in the propensity score for the data quoted. However, based on the data available on genre, its inclusion would not make a significant difference.

³⁶ The CE2 sample is significantly smaller 2139 vs 8621 works under CE1. In addition, the external database only had data on broadcasts until the end of 2023. This means that post-2023 non-national broadcasts of new films and series supported under development and/or the TV/online action under CE2 would not be taken into account. Hence, these early figures should be interpreted with caution, they are not necessarily evidence of any reduced effectiveness under CE2. The indicator needs to be revisited in the final evaluation of CE2.

³⁷ Given that the TV database for the comparison works ends with series broadcast in 2023, it is not surprising that most of the positive impact on TV circulation comes from CE1 (9.1 additional countries vs 0.06 for CE2). When it comes to VoD availability in 2024, the positive impact in terms of additional countries is comparable in magnitude for CE1 and CE2.

In addition to cross-country circulation, the counterfactual analysis also confirmed a strong positive impact on audiences, namely admissions to films when it comes to cinema. MEDIA support was associated with an average 125,419 more non-national cinema admissions (per supported film) relative to unsupported films. CE1 shows a stronger impact (additional 134k admissions) than CE2 (97k).³⁸ If this figure is extrapolated to all supported films under CE1, MEDIA funding is associated with an additional 241 million non-national admissions in total, as compared to non-supported EU films.³⁹ The additional admissions associated with MEDIA funding amount to 87% of the non-national audience of supported works and 71% of all non-national admissions to EU films (both supported and unsupported).

Based on the limited data available for VoD views/consumption, the significantly higher availability of supported works in non-national VoD catalogues do not seem to have translated into significantly higher views. On the contrary, unsupported works on average achieved higher views than supported works. The average views for supported works on VoD catalogues in the sample was 376,346 for works supported during CE1 and 496,676 for CE2 (405 361 for both Programmes combined). This compares to significantly more non-national views for comparable unsupported works, which average 1,301,953 views for the CE1 and 1 551 724 for the CE2 2 period (1,400,631 across the combined period). This may be explained on the one hand by methodological issues, and by market dynamics on the other.⁴⁰ All in all, despite the methodological problems, these findings showcase a significant challenge for MEDIA funding, namely to achieve the same success on streaming as it did in cinemas (in the absence of sufficiently granular data for films and series shown on TV, the impact of MEDIA funding on non-national TV audiences cannot be estimated).

Horizontal support to audience development complements support to individual works. While the counterfactual analysis included actions providing support to individual works or slates, MEDIA provides horizontal support to audience development, focusing on B2C engagement, through supporting cinemas and festivals in particular.

Most support to cinemas is dedicated to incentivising European programming, but also to exchanges of best practices among the members of the supported network, Europa Cinemas. Europa Cinemas is a continuing action under CE2. Both absolute funding rate and funding has increased significantly under CE2⁴¹ During 2014-2023, the network increased its geographical coverage by 32%: from 576 municipalities in 2015, to 762 in 2024, in almost all MEDIA-participating countries. This increase has been gradual

³⁸This can be explained by the fact that CE2 is ongoing and has a weaker sample – when it comes to distribution and development support, there is a time delay between support and screenings. This means that some of the additional admissions will materialise (development) or will become known (distribution) at a later stage.

³⁹ Based on average European ticket prices in 2019.

⁴⁰ From the methodological viewpoint, there is a high probability of errors in the estimates for audiences using the relevant external database. Streaming services have a very strong influence on viewer decisions on what content to watch, as confirmed by two EU-wide consumer surveys commissioned by DG CNECT. The counterfactual model could not control for these differences in which films and series were promoted more strongly on the relevant services. Furthermore, distribution support under MEDIA is focused on cinema –and does not cover series, which take 78% of viewing time online. Finally, MEDIA-supported works compete on streaming with the streamers' own commissioned content. Views on streaming services is relatively concentrated on a few top titles, so a few successful original titles on streaming services can in theory accumulate enough views to significantly influence the above findings.

⁴¹ From an annual EUR 11 million support and 50% funding rate to an annual EUR 15.9mn with 95% under CE2.

over this period, both under CE1 and CE2. The network's members are located in large and smaller cities alike, also in sparsely populated areas where access to a cultural offer is more challenging. Accounting for only 10% of all screens in the EU, by 2023 Europa Cinemas sold almost 40% of all tickets to non-national European films (16/41 million). The average share of non-national films from MEDIA countries was around 35% under CE1 but dropped to around 30% under CE2. This can be explained by the UK leaving the Creative Europe Programme and hence UK films no longer counted in this indicator. The 30% is still considerably higher than the total share of non-national admissions to EU27 films in the EU (7.5% in 2014, 7% in 2020 and 6% in 2023⁴²).

As regards VoD networks and operators, EU support was introduced in 2014 and has contributed to the growth of independent streaming services. The user base for supported VoD platforms showing a high share of independent European works increased by 52% (users and subscribers) from 10,729,000 in 2016 to 16,322,535 in 2020. The call has attracted EU independent VoD services, whereas broadcaster VoD services have not applied (large national broadcasters typically develop their own national streaming services serving domestic markets). In particular some beneficiaries have expanded - there have been some recurring projects with a large reach and which attracted private investors, such as FilmIn (Spain) and MUBI (UK, supported under CE1 before Brexit). Also, the established cross-border player Arte has been a beneficiary of the scheme in recent years. The beneficiary platforms experiment with different business models (advertising supported streaming, online rentals and buys, and the most coveted subscription streaming). The level of funding makes up around 10% of revenues. Some supported services showed a sustained revenue growth of over 2.5 times over the last few years. Nonetheless the level of EU support, on average EUR 8 million per year, has clearly not had the ambition of creating platforms capable of competing with giant global streaming services such as Netflix, Amazon or Disney. Indeed, global competitors have a market share of over 80% of EU subscriptions.

Competitiveness

MEDIA funding has resulted in a substantial share of supported projects in development being produced and released. Across both Programmes an estimated 29% of films and series supported for development have gone (or may still go on) release. MEDIA development support is estimated to have contributed 26% of the total development costs of supported titles. This increased to 35% under CE2.

Available evidence indicates that MEDIA funding for development significantly increases the chances of a supported film or series being produced and released. While it is not possible to get reliable market-wide data on how many films and series in development get released eventually, anecdotal evidence suggests MEDIA results are significantly higher than the market average.⁴³ The positive impact of MEDIA on development success rate is also supported by evidence from the beneficiary survey: 76% of respondents to the beneficiary survey agreed that their projects contributed to increasing the capacity of audiovisual operators to develop European audiovisual works with a potential to circulate in the Union and beyond, and to facilitating European and international coproduction. Furthermore, it is notable that the 29% success rate of MEDIA funded development projects was achieved against a backdrop of increased financial risks

⁴² DG CNECT calculations based on the EAO Lumiere database

⁴³ See e.g. an estimate of a <5% success rate globally from an industry resource website: <https://australianfilmcentral.com/how-hard-is-it-to-finance-a-film-and-success/#:~:text=Estimates%20vary.,and%20fully%20financed%20Independent%20Films.>

for EU independent production in recent years.⁴⁴ As shown above (counterfactual), the design of MEDIA support for content creation has also increased transnational addressable demand for supported works and hence the competitiveness of production companies.

The time it takes for supported films and series to be released also seems to compare well with industry averages. The average time for titles funded under development to get released is 2.7 years for titles developed for TV and 3 years for titles developed for cinema.⁴⁵ This is similar to the average of even Hollywood studio films⁴⁶ (MEDIA supported films are all independent European productions, on average with much smaller budgets than Hollywood studio films).

Furthermore, the KPI on co-productions confirms the positive impact of MEDIA funding on the competitiveness of production companies. Co-productions increase competitiveness in various ways, in particular by increasing the addressable audience abroad, bringing in new sources of financing (public and private), combining know-how and capabilities, and transferring skills and know-how. As regards co-productions, as of end 2023 the 2027 target is on track to be met for the number of coproductions⁴⁷ and has already been exceeded when it comes to the budget of supported coproductions.⁴⁸

Moreover, co-productions involving two or more countries are indeed significantly higher among supported works than non-supported works. The review of external datasets conducted as part of the counterfactual analysis showed that across both Programmes an estimated 48.6%) of a large sample of works that had received MEDIA support involved two or more countries, in comparison, just 13.7% of comparable unsupported EU27 works⁴⁹. The share of European co-productions in all supported works has increased substantially under CE2 (from 36% under CE1 to 84% under CE2). This increase is driven by an increase in co-productions among works supported under the Content actions (development and TV/online production), thanks to the strengthening of the relevant eligibility and evaluation criteria (e.g. only co-development projects involving producers from different countries can be supported under CE2, while single-country development projects were eligible under CE1). Even single-beneficiary slate funding has supported a very high share of coproductions (87-90% of all funded projects).⁵⁰

In addition to the production sector, MEDIA funding has made a positive difference in EU distribution capacity, i.e. EU capabilities to distribute films from MEDIA-associated countries beyond national borders. MEDIA helped distribution companies sell 77 out of 100 tickets for films in non-national countries between 2013 and 2019. After

⁴⁴ A vast majority (80%) of producers responding to a 2022 targeted consultation of DG CNECT confirmed this as well as broadcasters and streamers participating in the consultations. See European Media Industry Outlook, 2023 edition. SWD(2023) 150 final, 17.5.2023

⁴⁵ Based on combining Programme monitoring data with external databases used for the counterfactual analysis,

⁴⁶ An average 871 days (cca 2.4 years) from a public announcement that a studio movie will be made, e.g. after the actual greenlight of the projects (sample covers 2006-2016) Source: <https://stephenfollows.com/p/how-long-the-average-hollywood-movie-take-to-make>

⁴⁷ 2182 coproductions supported by the end of 2023 against a target of 3000 by end 2027. [The budget of supported coproductions amounted to EUR 11,3 billion vs a 2027 target of EUR 1,2 bn]

⁴⁸ Annex VI

⁴⁹ A sample of 2629 supported works where a release on either TV, cinema or VoD could be verified vs a sample of 31 161 of unsupported EU27 works

⁵⁰ Support study for the evaluation, based on Programme monitoring data

the United Kingdom left the European Union (coinciding with the start of CE2) this number became even higher.

While there is a significant share of recurrent applications, there is also evidence of distributors growing as a result of support. From 2014 to 2023, 477 distributors got support from MEDIA under the automatic (non-selective) actions. 71 of these companies applied every year over this period. COVID lockdowns in 2020 and 2021 caused a major drop in film sales. In 2022, 71% of beneficiaries earned less money than they did in 2017. MEDIA helped these companies stay afloat during this hard time. Out of a group of beneficiaries who applied before and after COVID, 60% had grown their position in the market of non-national EU films, and this includes 26% of beneficiaries who more than doubled their shares.⁵¹

Distribution support under MEDIA also helped create some new jobs, though on average, each company created less than one new job. This figure suggests that, while the distribution-related support has facilitated some job creation, the overall impact in terms of job creation has been modest. MEDIA does not pay for staff costs, which may explain the small number of newly created jobs.

Also, several horizontal actions were funded to strengthen the business capacity of audiovisual market players in addition to the above detailed support to the creation and distribution of specific works. The actions on audiovisual markets increased opportunities for audiovisual producers and distributors to collaborate across borders, thus contributing to cross-border circulation of works. For example, in audiovisual markets producers can pitch their upcoming works to distributors who may then acquire the rights for their distribution. Producers may also come together to launch co-productions. MEDIA has financed the hosting of these markets and related networking activities, including on specific formats such as documentaries. MEDIA has also hosted Stands in major markets, providing accreditations and networking space. Under CE1, there were 670,000 participants in market access activities. Under CE 2, as of 2021 approximately 152,000 participants were supported. Despite this, as explained above, the target of 1.8 million set under the corresponding monitoring indicator (number of people reached by B2B promotional activities in major markets) may not be met, as COVID has changed habits as regards attending events.

A new scaled-up action, MEDIA 360, was launched under CE2 focusing on the major industry hubs, with the intention of supporting strategic programmes of activities that could have a structuring effect on Europe's audiovisual ecosystem as a whole, but it is too early to assess impacts. To date nine projects involving 13 beneficiary organisations have been made under this action totalling EUR 19,938,967. Projects so far typically focus on integrated training, networking, business to business and distribution activities, as well as targeted development and international co-production support in some cases. Data on outputs and results from funded projects is not yet available and impacts will need to be assessed once projects have been completed.

Another new action under CE1, Innovative Tools and Business Models attracted a lot of interest and supported promising projects, but it is again too early to assess the impact of the innovations covered by funding. This new action supports innovative solutions to the main digital challenges of the European audiovisual industry, such as financing, visibility, availability and digital consumption of European works. Projects are

⁵¹ Programme Monitoring Data

primarily focused on analytics and AI tools to support production, marketing and subscription models. However, the results and impacts of projects are not yet available at this early stage. This action currently does not have a formal KPI in the monitoring framework. The number of active business users of the funded tools after 3 and/or 5 years of funding could be a relevant indicator, but this would require beneficiaries reporting for 3 to 5 years on their active users. Also, more automatization of collecting data on the purpose of the supported tools may be considered (e.g. which stage of the audiovisual works life cycle do they aim to improve?).

Furthermore, both CE1 and CE2 have addressed priorities relating to capacity and skills development of professionals with an increased emphasis on the skills needed to harness the digital transformation and promote new business models under the current Programme.⁵² The Programmes supported a total of 14,959 training participants of which 13,478 were under CE1 (average of 46 participants per projects) and 1,646 through CE2 (average of 55 per project). The lower figures are due to a certain extent the impact of COVID.

While the formal monitoring indicator based on self-assessment of participants is on track to be met (see above), monitoring of results or impacts of training on competences and employability is weak, though it has improved under CE2. Two thirds of the supported projects across both Programmes did not record data from participants on the outcomes of the trainings provided. Under CE1, 27.19% of the total participants reported outcomes, showing that 88% of the participants used the learning acquired through MEDIA in their work. Under CE2, 71.39 % of the participants reported learning outcomes, indicating that 71% of the participants improved their competencies or increased their employability. Feedback from the beneficiaries' survey is also positive: 81% of respondents under CE1 and 84% of respondents under CE2 point towards developed new skills and competences.

Positive feedback from beneficiaries notwithstanding, the action had to be adjusted half-way under CE2 to enhance its relevance and coherence with the new legal base. MEDIA Skills development support appears to have been delivered in line with objectives under CE1. However, an internal assessment carried out by DG CNECT on the selected projects under CE2 showed that a significant number of projects prioritised the creation and production stages. Digital and greening transformations lacked sufficient focus: overall, these priorities were not at the core of the funded training initiatives (only 2 out of the 59 funded projects under CE2 focused on the greening of the industry). Finally, a certain degree of overlap was detected between the Talent and Skills and the audiovisual Market actions, as both addressed knowledge sharing and networking activities. In the light of these findings, the call on Talent and Development Action was streamlined in 2024, with a stronger focus on addressing skills' gaps in the digital age, developing new business models, enhancing IP rights exploitation, and promoting sustainable practices across the value chain, encouraging participation of professionals across the audiovisual and gaming value chains. Support to networking activities among professionals was included under a revamped action on Markets and Networking.

⁵² Creative Europe 1 set a priority to facilitate the acquisition and improvement of skills and competences of audiovisual professionals, and the development of networks; while the current Programme specifically focusses on 'enhancing the capacity of audiovisual professionals to adapt to new creative processes, market developments and digital technologies that affect the whole value chain'. This priority is supported by an indicator the number of participants who assessed that they have improved their competences and increased their employability.

Overall, both the public consultation and beneficiary survey confirmed convincingly the positive impact of MEDIA funding on competitiveness of funded enterprises under both CE1 and CE2. 57% of CE1 beneficiaries and 81% of CE2 MEDIA beneficiaries agreed that MEDIA was effective in supporting competitiveness in general. This view was shared by less, though still a majority (60%) of distribution support beneficiaries. As regards the impact on their own activities, the two aspects of competitiveness where MEDIA support was considered strongest was increased visibility for the beneficiary's work in the sector and increased capacity for transnational cooperation with 94% and 89% of MEDIA beneficiaries reporting positive impacts. These results are comparable across both Programmes. Again, the results were weaker among distribution than content creation beneficiaries, but still mostly positive. It is notable that the survey confirmed the strongest positive impact in the two areas where the quantitative findings also showed strong impacts (addressable demand and co-productions). Overall, 90% and 85% of CE1 and CE2 MEDIA beneficiaries respectively reported a moderate to significant impact of MEDIA funding on helping them increase their market position and/or financial turnover. A similar share of beneficiaries reported moderate to significant impact on job creation, without major differences across the two Programmes.

Despite the positive impact of MEDIA funding in helping beneficiaries become more competitive, there are significant limits to what MEDIA could achieve in the wider market context, as market share metrics show. MEDIA support is associated with wider transnational circulation and consumption of European audiovisual works, supported a number of co-productions significantly above the market average, and supported many internationally acclaimed works. Despite this, the overall market share of non-national EU audiovisual works has not improved over the evaluation period. In particular, non-national EU works account for 6% of cinema admissions and 7% viewing time on EU streaming services (the latter a decrease from 11% in 2020). US works by contrast account for around 61% VoD view time and 66% of admissions⁵³.

The funding under MEDIA (roughly 200 million annually even under the increased budget of CE2) is very modest compared to the overall audiovisual sector (worth around EUR 100 billion in the EU) and cannot in itself change the strong market trends in the sector and the wider attention economy. The latter include changing consumer behaviours, the behaviour of major US studios, streamers and tech companies or EU broadcasters and national authorities. The results of the counterfactual analysis on streaming views of supported works and the decreasing views for EU works despite MEDIA funding are a case in point: the recommendations within streaming services are one of the top influences on viewing behaviour, based on consumer surveys⁵⁴, and these are at the discretion of the services themselves. Less than 20% of streaming subscriptions are for EU streaming services, which means that extra-EU companies have a very strong influence on what type of content people in the EU consume.

⁵³ European Media Industry Outlook, SWD(2025)261, 5.9.2025; European Commission: Directorate-General for Communications Networks, Content and Technology, The European media industry outlook – September 2025, Publications Office of the European Union, 2025, <https://data.europa.eu/doi/10.2759/0606593>

⁵⁴ 'Consumer survey on consumer behaviour and preferences related to the consumption of audiovisual entertainment content – Final report, Publications Office of the European Union, 2023, <https://data.europa.eu/doi/10.2759/55576>; European Commission: Directorate-General for Communications Networks, Content and Technology, Study on audiences, consumer behaviour and preferences relating to the consumption of media content – Final report, Publications Office of the European Union, 2025, <https://data.europa.eu/doi/10.2759/5502681>

Finally, the audiovisual sector is heavily dependent on public funding, and MEDIA is only a fraction of total national funding. Public funding is the leading source of finance for films and second most important source for series. Public service broadcasters commission over half of broadcast fiction titles. Even the increased annual MEDIA budget under CE2 was less than 1%⁵⁵ of the total national funding to public sector broadcasting in the EU (2021-2023).⁵⁶ This does not include direct grants given by national film funds or tax benefits. In effect this means that non-national works targeted by MEDIA not only have to compete for audiences' attention with US and other international works, but also national works supported from (in aggregate much higher levels of) national funding.

Level-playing field: geographic and linguistic diversity

In 2021 the first Work Programme of CE2 introduced a renewed and streamlined set of level playing field (LPF) measures to be taken, using eligibility and award criteria. Overall, there was a stronger emphasis on collaboration with opportunities for mutual learning between companies from countries with different capacities. This section looks at the two relevant performance indicators (supported co-productions involving a low-capacity country and works supported in lesser used languages) and then presents further data and analysis on the level playing field, geographic and linguistic diversity.

A strong positive development can be observed in co-productions involving high and low audiovisual capacity countries, driven by targeted measures in content creation support under CE2. Under CE2 there has been a notable increase in the share of support for titles that involve collaboration between high and low-capacity countries. The share of all supported works across all content and distribution actions that involve collaborations between low capacity and high-capacity countries has increased from less than 5% during CE1 to around 30% under CE2. This increase has been driven by the higher share of support through content actions and associated eligibility and evaluation criteria related to beneficiaries from lower capacity countries within these actions, including a new specific development action supporting slates of producers from low-capacity countries. This notwithstanding, the level of involvement of partners from low-capacity countries can vary.

There has also been a notable increase in recent years in the share of works in lesser used languages developed, produced and distributed with MEDIA support. Under the previous iteration of the Programme typically around 25% of supported works were in lesser used languages. Under the current Programme, this is just over 30%.⁵⁷

Horizontal audience development support under MEDIA also had a positive impact on geographic and linguistic diversity.

- The **Europa Cinemas** network implements a positive action for cultural diversity promoting films in lesser-used languages. The screenings cover hundreds of films from almost all MEDIA countries (depending on the year), with for example 9 countries being represented among the top 20 most screened titles in 2023.

⁵⁵ See footnote 11

⁵⁶ DG CNECT calculations based on EAO data on public service broadcasting revenues

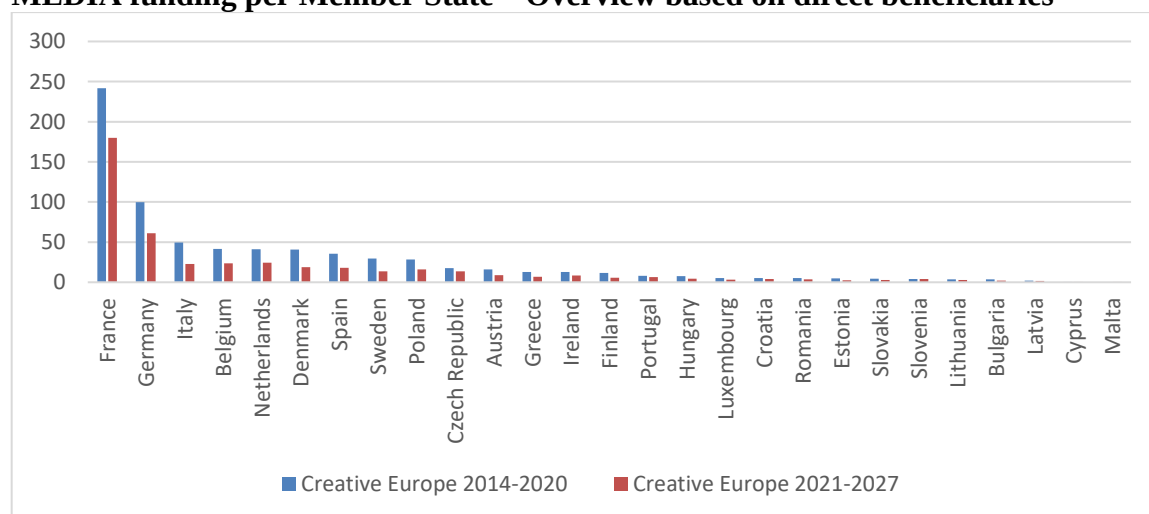
⁵⁷ Support study for the evaluation, based on Programme monitoring data

- As regards **festivals**, recent third-party analysis⁵⁸ shows that smaller festivals which are the target of MEDIA's festival support, especially the network of festivals action, show a higher share of films from smaller countries than the large, well-known festivals (Cannes, Berlin etc). The geographical distribution of the festivals supported under MEDIA has improved through the support to networks of festivals introduced under CE2. The outreach of the networks presents a very diverse geographical distribution (26 European countries in total). Altogether, over 13,000 films from low-capacity countries were programmed at supported festivals.

In training and skills development actions, countries with low audiovisual production capacity are also relatively well represented. Although data was not collected on the geographic background of participants, in CE1, projects coordinated by organisations from lower capacity countries received 29% of funding and in CE2 they received 32% of the funding.

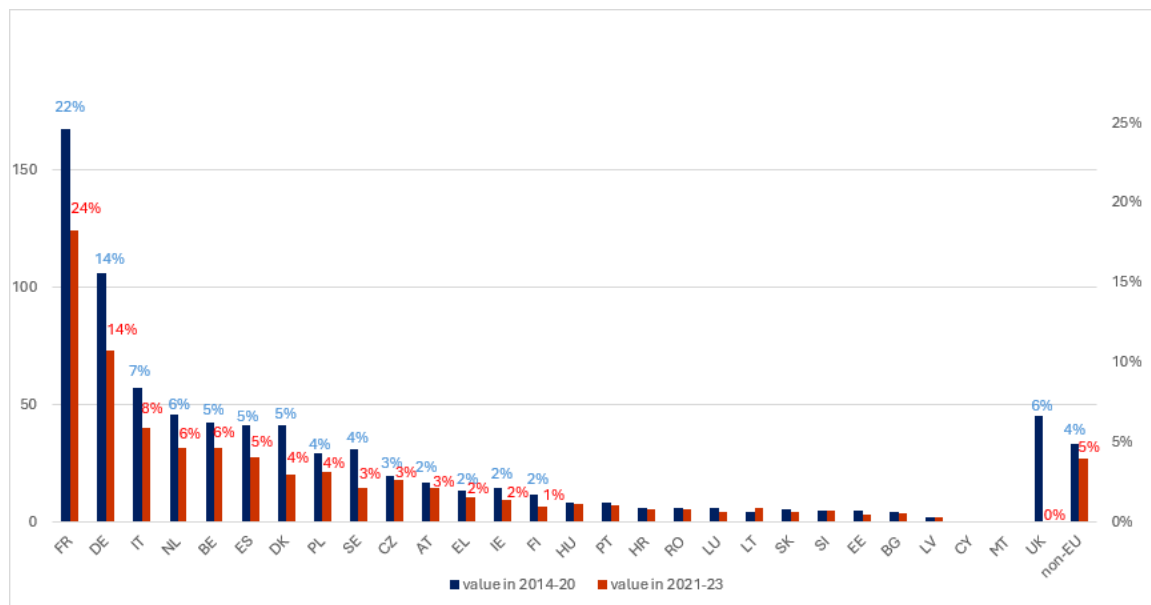
Despite these measures, support is concentrated in a limited number of countries and languages (see figure below), though the gap has narrowed. Under the previous Programme higher capacity countries received on average EUR 0.36 per capita, compared to EUR 0.23 per capita for low capacity countries. Under the current Programme, higher capacity countries have received EUR 0.48 per capita, a 34% increase, whilst lower capacity have received on average, EUR 0.35 per capita, a 54% increase. Belgium, Denmark and the Netherlands are amongst the top beneficiaries and receive more per capita than bigger countries such as Germany, Italy and Spain.

MEDIA funding per Member State – Overview based on direct beneficiaries



⁵⁸ CresCine project supported under Horizon Europe: *Uncommon Venues for Exhibition and Distribution in of Film in Europe*, 2025 report

MEDIA funding per Member State – Overview including split among indirect beneficiaries where relevant⁵⁹



For a number of reasons, the largest volume of funding continues to go to France. The French audiovisual sector benefits from a particularly favourable environment, with high cinema density and audiences combined with strong domestic funding notably for the production of content. It also has regular co-productions with neighbouring countries sharing the same language (BE and LU). Following Brexit, French sales agents are pre-eminent in the sale of foreign films across the EU. France also has the biggest audiences for non-national European films, meaning that French distributors gain the largest share of MEDIA support for distribution.

Finally, despite the positive trend in co-productions, including between low and high-capacity countries, further analysis reveals room for improvement when it comes to diversity. Only one of the top ten most common cooperations was between two low-capacity countries. (between Czech Republic and Slovakia, which also share close cultural connections). Close geographic, linguistic and organisational links can be observed across the other most common cooperations, such as between Belgium and France, Denmark and Sweden and Austria and Germany.⁶⁰ Low-capacity countries were the primary production country in less than 10% of all supported co-productions between 2014 and 2023⁶¹. Indeed,

⁵⁹ DG CNECT calculations based on project monitoring data. The data includes the split and contribution to the members of the Europa Cinema network. The grant covering the network cost is allocated to the country where the network is established. The data includes the split and cascading grant contribution with the 2019 and 2020 Distribution selective support. The split of the grant to the individual distributors is taken into account while the grant covering the coordination costs is allocated to the country where the sales agent is established.

⁶⁰ Support study to the evaluation.

⁶¹ DG CNECT calculations based on project monitoring data.

cooperation with a lower capacity country can mean limited cooperation mainly only financing (e.g. the junior partner can bring national funding from their country) or providing services for location shooting in contrast to ‘genuine’ collaborations on creative aspects. The level of cooperation between different countries in supported works could be more explored for the final evaluation of CE2.

Overall, both CE1 and, in particular CE2, has resulted in significant developments in improving the level playing field across MEDIA countries. However, continuous efforts are needed for further improvements. Following the introduction of a development action dedicated entirely to low-capacity countries, a reform of the selective distribution action is underway. A recent study on the level playing field⁶² provided a number of recommendations to increase the participation of lower capacity countries. These included expanding efforts to increase participation of low-capacity countries to actions beyond content creation, for example the training actions; and increase support for high quality co-development projects which involve creative collaborations between high and low-capacity countries. In addition, national support for the same works or activities could be taken into account when allocating funding for MEDIA. This would require a closer mapping and monitoring of actions at Member State level. As currently information on Member State funding is not available in a standardised format that would lend itself well to further analysis, a first step could be to create a standardised monitoring framework.

Horizontal priorities - Diversity and greening

Indicators show a positive association of MEDIA content creation funding with gender diversity and women are well represented in training actions as well. The share of MEDIA supported works written and directed by women exceeds industry-wide shares and has increased over time. The share of female directors and writers of works supported under content actions through Creative Europe 1 was 30% and 35% respectively. This has increased to 42% and 44% respectively under Creative Europe 2. These shares clearly exceed wider industry shares of women writers and directors, whilst the increase over time also reflects sector trends over this period. Collection of data on distribution titles was more limited. Of the 516 titles where gender data was recorded, 147 had a female director (28%) and 170 (33%) works were written by women. Data on other roles, e.g. producers or cinematographers, or workforce composition of beneficiary organisations is not collected. Furthermore, across both Programmes more than 50% of the participants in training actions were female. The share compares relatively well to industry shares of female participation.⁶³

Greening and diversity are consistently included in evaluation criteria of the development and TV/online actions and their weight in the scores is significant. For example, in TV/online scheme calls in recent years, each of these aspects weighed as much as the co-production criteria, which, as explained above, is central to MEDIA’s competitiveness approach. By way of another example, the twelve supported networks of festivals carry out collaborative projects to enhance research on sustainability and social awareness. Unfortunately, for the time being, no data is available for indicators other than female writers and directors, for measuring the impact of MEDIA in other aspects of

⁶² European Commission: Directorate-General for Communications Networks, Content and Technology, ECORYS and Technopolis, *Study on broadening participation under the creative Europe media programme – Final report*, Publications Office of the European Union, 2025, <https://data.europa.eu/doi/10.2759/8297102>

⁶³ Evaluation support study, based on monitoring data

diversity and greening. While these indicators can be developed for the final evaluation, the only reliable source for data would be additional and standardised reporting by beneficiaries (unlike for circulation and audiences of audiovisual works, there are no off-the-shelf external databases that could be used to check the impact without additional reporting obligations on beneficiaries).

Video games

Although most MEDIA financing targets the production and distribution of films and series, video games and new forms of interactive content (i.e. XR) are also supported through the Programme. This is, through a dedicated action devoted to the development of narrative video games and XR, and by making video games and XR eligible under MEDIA market and training and innovation actions.

Yearly support has increased under CE2. Altogether, a total of 307 development projects have been supported since 2014 for a total of EUR 37,298,747 over nine years. 207 projects were supported under CE1, in comparison with 100 projects in 2022-23 only (no call was launched in 2021 owing to the late adoption of the legal basis). The highest number of projects (56) were supported in 2023, reflecting a step increase in the budget under CE2. The budget between 2014 and 2020 was relatively steady, with considerable growth in 2022. As a result, the funds awarded in 2023 were twice those awarded yearly between 2014 and 2020.

Support for video games is distributed geographically, encompassing most EU countries and reflecting the presence of dynamic gaming hubs across the EU. Over the 2014-2023 period, beneficiaries have come from 26 countries, including 23 EU Member States and 3 non-EU countries (Norway, Serbia, and the UK). The largest number of beneficiaries are from Germany, France, and Poland, followed by Denmark, Norway, and Italy. Countries considered to have low audiovisual capacity, such as Croatia and Lithuania, are well represented in the gaming sector, highlighting the different market realities between the gaming and films sectors.

MEDIA funding for game development significantly increases the chances of videogames being finalised and released. On average, 89% of development projects supported became prototypes³. A third of the supported projects were eventually commercialised. While there are no market-wide data on the failure rate of development projects, anecdotal evidence from national sources suggests that MEDIA results are significantly better than the market average, in particular in the indie games segment which MEDIA mostly provides for. It also underlines MEDIA's ability to select viable projects.

Genre and budget may be relevant factors in success, but country of origin does not seem to matter. Among the unsuccessful projects, the predominant theme is "Adventure", which might suggest a higher level of competition in this genre. Half of the abandoned projects had estimated development costs of under EUR 200,000, highlighting their small-scale nature – and therefore the relative fragility of these projects. However, the country of origin of the companies did not appear to influence a project's success.

MEDIA supported games are well recognised at prestigious industry awards. Between 2014 and 2020, 38 MEDIA supported games were nominated to a total of 175 awards across 20 different events, scooping 36 awards. This means that around 1 in 8 video games supported by MEDIA have been nominated for at least one award. In the five most prestigious ceremonies, they achieved 52 nominations and 12 wins. The most awarded games so far were "It takes two", which scooped 12 wins, The Witcher Blood and Wine

DLC – both scooping the “Game of the Year” award of the leading industry ceremony. The latter were big-budget games – The Witcher Blood and Wine DLC reportedly cost €72 million to produce.

MEDIA supported games are available on at least 18 different distribution platforms/devices, with the highest number of projects found on Windows, PS4, Xbox One, and Switch, mirroring the consumption patterns on the market. On average, each supported project anticipates being available on 3 different platforms/devices. In 2022 and 2023, this average increased to four platforms, with a notable rise in VR availability. This seems to show that over time the selected projects are making efforts to enhance their distribution channels and revenues streams.

Efficiency

As regards cost-effectiveness, MEDIA supported a large amount of audiovisual works, which resulted in a stronger cross-border cultural dimension. Across both Programmes MEDIA has supported a total of 7887 original unique titles (films and series). As shown under ‘*Effectiveness*’, MEDIA support is strongly associated with a much wider cross-border-circulation and significantly more non-national admissions than unsupported works. On aggregate, under CE1, MEDIA support was associated with an additional 241 million admissions and almost 13,000 cross-border releases compared to unsupported works. Based on works supported for content creation, MEDIA funding of EUR 236,006,151 attracted other sources of investment totalling EUR 1,754,327,546 (1:7.43) under CE1. For CE2, it is too early to make a similar calculation as the benefits of support will take more time to materialise. For distribution related support, the corresponding ratio is 1:2⁶⁴.

Supporting networking and market access has become a more cost-effective way to support competitiveness. Networking and market access projects were supported with a total of approximately 670,000 reported participants at an approximate cost of EUR 80 per person in CE 1. In CE 2, support for 76 Markets and networking projects was funded with a total of 150,000 participants to date. At EUR 57 per participant (2021 only), this represents a 26% decrease per participant. This was cost-effective in view of the benefits in presence of European audiovisual firms and works at major international film festivals creating business opportunities for collaboration.

Support to training sought to upgrade the creative, management and technical skills of audiovisual professionals, as well as fostering collaboration at the European level. Training was provided for over 13,000 participants (52% women) with 29% of training funding to beneficiary organisations based in LCC countries. The cost was approximately EUR 4,000 per participant. Under CE1, the cost per person amounted to EUR 3,932 while in 2021, under CE2, it totalled EUR 5,738 per person trained, a 46% increase per person trained in comparison to CE1. Such difference could be explained by the fact that a large majority of the training Programmes rely on in-person formats, including in prestigious film festivals and markets where the costs of attending those events in person have increased over the years, owing to rising travel expenses and accommodation costs. When the action was reviewed in 2024, the provision of **hybrid training** (both online and in-

⁶⁴ Source for figures in this section: support study to the evaluation

person) was encouraged, while travel and accommodation costs were kept to the strict minimum.

The support to innovative tools and business models was introduced in 2021 to foster solutions to the main challenges of the European audiovisual industry in the digital age. A total of EUR 29,258,510 across 43 projects and 62 beneficiary organisations has been awarded (average grant EUR 680,430). The total contribution by beneficiaries is EUR 27,177,426 (average EUR 632,033), showing a significant level of co-financing by the beneficiaries.

The EACEA efficiently implements the Programme. It has implemented MEDIA since well before 2014. It is a well-established centre of expertise with the necessary tools for administering about 2,000 projects per year, thus allowing DG CNECT to focus on policy-related activities.⁶⁵ The EACEA is implementing the large majority of the open calls for proposals of Creative Europe, including the publication of the calls, the management of the evaluations, the contracting and project follow-up. The EACEA is consistently reaching target KPIs on efficiency, with time to grant within 9 months, time to pay within the 30-60-day limits and an error rate well below 2%.

A number of efficiency-enhancing measures were taken during the evaluation period. During the 2014-2020 period, an online application and reporting system was implemented for all actions. The use of lump sums was introduced for three high volume actions such as the Single Development support, the Festival support and the Cinema Selective support. Lump sums were further extended as of 2021, including through budget-based lump (Lump sum type II). All 5 actions of the content cluster (European Co-Development, European Slate development, European mini-slate development, Video Games and Immersive content development, TV&Online content) and the Festival action are implemented through fixed or budget based lump sums since 2021, covering around 46% of all grants signed in the period 2021-2024.

The range of funding schemes has been implemented through a wide variety of modalities, with different levels of efficiency. For example, one of the most efficient schemes was the European Cinemas network, which was contracted through a single coordinating organisation, but which has used a cascading grants system to channel funding to over 1,300 member cinemas. This was a cost-effective solution because the administrative costs were reduced to a minimum as there was only one grant of EUR 10 million per year and three payments to be processed.

However other schemes were significantly more complex to administer. Therefore, the approach from 2014-2020 was to progressively streamline the schemes, in dialogue with industry and Member State stakeholders. In particular, the Distribution Automatic scheme was streamlined to consolidate small grants (per film) into larger allocations (per distributor) and also minimum project thresholds were introduced. Thus, the number of grant contracts fell from over 1,000 to approximately 300 annually. The Sales Agents

⁶⁵ An evaluation of the Agency was completed in April 2019 of the EACEA. This shows that the EACEA was effective in the implementation of its operational priorities and performed well in the execution of delegated functions with very good results in meeting the main indicators describing the timeliness of its evaluation, contracting and payments process.

scheme, which shared a similar operational structure with the Distribution Automatic scheme, was also streamlined.

The Distribution Selective scheme was revised to enable a more strategic approach to coordinating multi-territory film releases. This included the consolidation of grants into a support to third parties model coordinated by Sales agents, significantly reducing the amount of grant contracts required to support a comparable number of works. For example, the number of individual grants was reduced from on average 206 grants to an average 26 grants per year between 2014 to 2018, to an average of 21 grants to support 21 films per year for 2019 and 2020.

Overall, the impacts of these changes can be illustrated by the significantly reduced number of grants made to support comparable levels activity. The number of grants made in 2019 and 2020 was 785 and 806 in comparison to an average of 1475 project grants per year between 2014 to 2018, a 46% decrease. This resulted in an increased grant size, from EUR 53,000 in 2014 to EUR 165,000 in 2020.

However, other schemes could not be streamlined during CE1. The Development schemes (single, slate) attracted on average 900 applications per year, leading to 200 selected projects for an average grant of EUR 83,000. The selection process required the extensive use of experts. As of 2021, the development schemes have been refocused on bigger projects (co-productions and slates or groupings). The average number of proposals to be processed by the agency has therefore dropped from 915 proposals to 470 proposals / year in the 2021-2024 period. The average number of annual grants for these development actions has dropped from 215 during the 2014-2020 period to 178 in the 2021-2024 period, while the average grant amount was increased from EUR 83,000 to EUR 163,000.

Also as regards support to festivals, the provisions of the legal act did not allow reducing the number of grants over 2014-20. Over the period, 535 grant contracts were established with 123 organisations (recurrent beneficiaries received successive annual grants). However, as of 2021, the networked collaboration dimension was strengthened, notably through the new Festivals Network action which has alternated with the traditional support to individual festivals on a bi-annual basis. A total of 12 networks and grants were funded in 2022 and 15 in 2024, for a value of EUR 5.6 million in 2022 and EUR 7.9 million in 2024. In parallel, the total amount of funding awarded to individual film festivals in 2021 and 2023 was over EUR 19 million with an average grant amount of EUR 103,059 for a period of two years. This compares to an average of EUR 45,397 under the previous Programme when grants were awarded for a period of one year.

Overall, since 2021 the number of calls per year has been reduced further to an average of 14 annual calls and 16 selection rounds (compared to an average of 16 calls and 20 selection rounds in the previous period), through streamlining and multi-annual programming. As part of this the average duration of the grants has now increased from 1.5 years under the predecessor Programme to over 2 years⁶⁶ under the current

⁶⁶ Under some current Creative Europe actions e.g. European Platform and Network projects, Automatic generation scheme / European film distribution, Audience Development, Film Festivals and Training beneficiaries will need to prepare applications three or two times less frequently than under the predecessor Programme. In this respect Cinema Network scheme represents untapped potential. The scheme has supported Europa Cinemas throughout the predecessor and current Programme and its average project duration only increased by four months.

Programme,⁶⁷ effectively reducing the administrative burden associated with more frequent applications by around 40%.⁶⁸

The increased use of multi-annual funding and cascading grants has further increased average grant for projects, under CE2. The shift towards larger and longer grants was acknowledged and welcomed by stakeholders as strengthening their capacity.

Some actions with particularly competitive calls had lower than average success rates as of 2023. These therefore need to be monitored closely to assess if eligibility criteria need to be adapted in order to filter the relevant proposals at early stage, or if the budget allocation can be increased, in order to avoid unnecessary applications, which are costly both for the applicant and the Programme administration. This concerns in particular the following schemes: European Video-Games and Immersive content: success rate in 2024 was 16.7% (vs 58% in 2022); European Co-Development success rate in 2024 was 20% (vs 41% in 2021); Innovative Tools and business models success rate in 2024 was 11% (vs 45% in 2021).

Given the need for increased focus on monitoring set out in this evaluation, additional human resources may need to be reallocated through efficiency savings on project selection and execution.

Coherence

There is good coherence between the general objectives, specific objectives and priorities of the strand. The MEDIA strand actions in CE1 directly supported the priorities by facilitating the transnational distribution and promotion of European audiovisual works. Under CE2, new and revamped actions (e.g. games and immersive content, innovative tools), reflect the new strand priorities responding to the evolving digital environment. The support to competitiveness is reflected in the specific objectives of scalability and cooperation and the focus on international co-productions. The introduction of MediaInvest, a European equity investment vehicle, reflects the priority of boosting private investment in audiovisual and gaming.

The MEDIA strand is coherent with EU policies and initiatives related to the European AV sector, namely the Media and Audiovisual Action Plan (MAAP), the Audiovisual Media Services Directive (AVMSD), the copyright framework and the European Media Freedom Act (EMFA). The MEDIA strand accompanies the objectives of the AVMSD, which ensures the free provision of audiovisual services in the single market, as well as promoting European works, enhancing cultural diversity and media pluralism. Notably, MEDIA strengthens the capacity of the EU audiovisual industry to produce audiovisual works which can be successful across the single market. Also, MEDIA requires alignment of third countries with the provisions of the AVMSD. MEDIA also funds the functioning of the European Board for Media Services established by the EMFA.

⁶⁷ Under the previous Programme around 67% of projects were two years or longer, while this has increased to 78% of projects under the current Programme.

⁶⁸ Tracing continuity of actions across the programmes is not an exact science due to changes to particular actions, actions discontinued as well as new actions created. This number was produced by comparing the average duration of the project for actions that can be traced across both Programmes.

The objectives of the MEDIA Programme are also well aligned with the objectives of the 2019 Digital Single Market Copyright Directive, in particular with regard to supporting content creation in the digital age and its access across-borders.

MEDIA is complementary to national support under the RRF and Cohesion Policy.

A few Member States included provisions in their Recovery and Resilience Plans to use RRF funding to support the AV industries. When used, it has focused mainly on boosting national production and attracting overseas productions, with limited attention paid to priorities related to the Single Market. Also, Cohesion Policy appears focused on the regional dimension through digital, cultural and the business development. Examples of these investments include the setup of an open platform in Poland to access digitalised heritage films (digital), refurbishment of cinema venues in Hungary (culture), and a videogames cluster in Croatia (business development).

Support to videogames cuts across different EU programmes. Video gaming has established itself as a key economic and cultural activity in the EU, underpinned by both creative and technological advancements. While Creative Europe supports the early-stage development of specific video game products, Horizon Europe's action aims to support research that addresses the potential role and scope of the video game value chain and industry, including the application of video game technology to other sectors, areas that are not currently addressed by the MEDIA strand.

Views from stakeholders representing the sector as well as beneficiaries of projects supported by the MEDIA strand suggest that there is less awareness of other relevant EU funding sources. The beneficiary survey showed that 57% of respondents under both funding periods felt that the MEDIA strand was complementary to other EU funding opportunities, but 40% indicated they did not know. Sectoral organisations interviewed elaborated further, suggesting that while funding programmes like Horizon Europe could be relevant for R&I in the AV sector, many organisations are either not aware of these opportunities or the calls are too technical for MEDIA beneficiaries, mostly producers and distributors.

As regards Member State programmes, most of the support available to the AV sector at the national level focuses on the production of content.⁶⁹ Although the majority of Member States have support for the development of AV works, the scale and scope of this support is limited, with focus primarily on national works, whilst MEDIA focuses on co-productions. MEDIA support to distribution helps Member States to effectively promote their works outside their home markets. Nonetheless, “international promotion” (export) measures have been developed in some member states e.g. in FR, DE, IT, AT, NO and FI), calling for increased synergies between national and European support.

Furthermore, the scale of domestic support for AV sectors is uneven across Member States. For example, public service broadcasters in Europe commission half of the fiction titles for TV and streaming⁷⁰, but there are enormous differences in their funding. For

⁶⁹ Based on: European Commission: Directorate-General for Communications Networks, Content and Technology, ECORYS and Technopolis, *Study on broadening participation under the Creative Europe Media programme – Final report*, Publications Office of the European Union, 2025, <https://data.europa.eu/doi/10.2759/8297102>; and the evaluation's support study, including case studies.

⁷⁰ <https://www.obs.coe.int/en/web/observatoire/-/downturn-in-european-tv/svod-fiction-production-the-number-of-titles-fell-across-all-formats>

example, Romanian public service television receives around EUR 22 per household in public funding, while the same amount is EUR 158 for Danish public broadcasting.⁷¹

4.1.2. Culture

Effectiveness

Creative Europe 1, Culture Sub-programme

The Culture Sub-programme invested EUR 439 million over the years 2014-2020 to support the CCS in the EU and third countries associated to the Programme. In total, it supported 1,213 individual projects involving 4,375 beneficiary organisations and more than 7,500 cultural activities⁷² with a strong focus on a transnational approach (98% of projects having a cross-border component). A typical transnational project involved around 10 partners from 8 different countries working together for up to 3 years. The results of the Beneficiary Survey conducted for the evaluation found that 8 in 10 partnerships formed under CE 1 continued after the funding period, because of the benefits participating cultural organisations had gained from these collaborations.

The Culture Sub-programme's strong international focus is visible in all its actions, in particular in the support to **European Cooperation Projects**. This action financed 491 small-scale projects and 128 large-scale projects, all of them with **cross-border collaboration**, bringing about many benefits for project partners from various CSS. Firstly, transnational work helped internationalise careers of the artists and cultural professionals involved, as well as the circulation of their works. In line with its specific objective, the Culture Sub-programme supported in this way the **mobility of artists and cultural and creative professionals**. To capture the scale of this mobility a corresponding indicator was added in 2019: *“the number of artists and cultural and creative professionals geographically mobile beyond national borders due to the Culture Sub-programme support, by country of origin and gender”*. From 2014 to 2020, the Sub-programme supported 22,763 professionals internationalise their careers and gain experience in other countries, corresponding to a total of 296,083 mobility days. However, for CE1, the country of origin and gender of beneficiaries were not collected, but this was remedied in CE2.

The Sub-programme also funded 660 artistic residencies to support professionals to work abroad and enhance their capacity to operate internationally. According to a Beneficiary Survey, 64% of those who received this support said it **directly helped them advance their careers** in an industry that remains very competitive. This career advancement was particularly apparent in terms of helping participants **develop new international networks, foreign contracts and reach new audiences outside of their home country, increasing in this way their competitiveness**. 65% of respondents highlighted that the support had a significant impact on the increase of their mobility and the internationalisation of their careers. Participation in cross-border mobility also contributed to increase cultural operators' sense of belonging to a common cultural area.

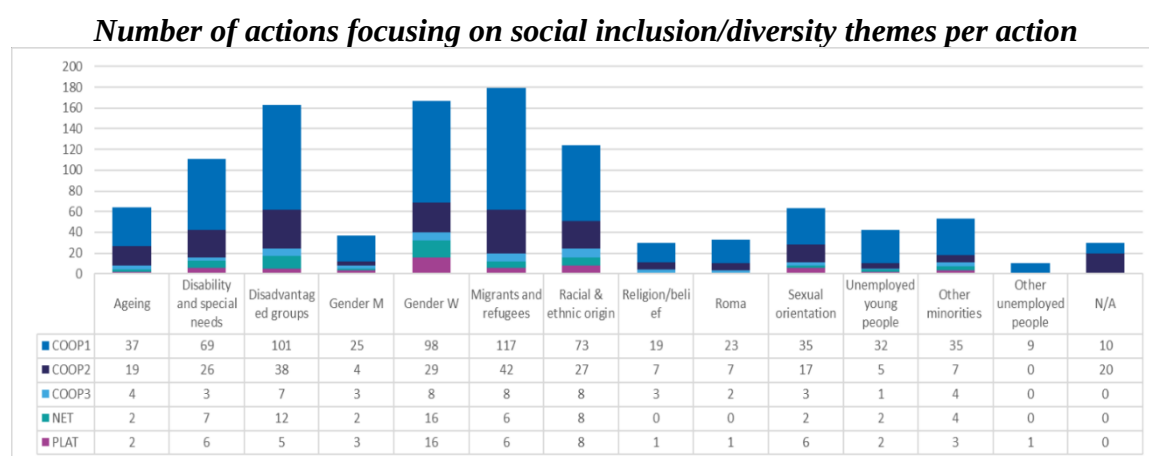
The Sub-programme helped in building the capacity of the CCS, which is very relevant as these sectors are composed of 95% of small and micro-organisations, often lacking the

⁷¹ DG CNECT calculations based on household data from Eurostat and data on public service broadcasting funding from the European Audiovisual Observatory.

⁷² This is the total number of activities for the Cooperation projects only, which represent around 60% of the total funding of the Culture Sub-programme.

capacity to capture key market opportunities. As a token of this endeavour, the Sub-programme invested EUR 80 million in 23 pan-European Networks between 2014-2016 (and 28 between 2017-2020) covering different CCS such as cultural heritage, music or performing arts. It also supported 8 European Platforms up to 2016 (and then 15 from 2017-2020), that promoted over 6,000 emerging artists. In particular, the Networks provided their members with business-to-business capacity building activities across a large range of subjects, from how to market works abroad, greening their activities, how to reach disadvantaged or underrepresented groups, through to developing funding applications and developing managerial capacity. The **capacity-building** support funded over the period was particularly impactful in terms of helping the sectors develop new digital skills among practitioners and helping to integrate digital technology into cultural production and dissemination. These new skills manifested themselves in many innovative projects ranging from virtual museum tours and online exhibitions to the creation of cultural smart phone apps to enable audiences to interactively access cultural works. The above-mentioned networks do not collect data on the extent to which their capacity-building work helped supported organisations to grow (e.g. create additional contracts). However, 87% of respondents to the Beneficiary Survey said that capacity-building support had an impact in terms of helping them develop skills to work transnationally, with around 70% saying it had either a major or significant impact.

The Culture Sub-programme also supported projects in reaching audiences, and in particular new audiences that generally do not engage with culture. Monitoring data show that one in four projects had a specific focus on reaching an underrepresented group, including minority ethnic groups, younger people and migrants, with 76% of projects being effective in reaching audiences that do not tend to visit, watch or consume culture.



Source: Ecorys, based on Creative Europe Programme monitoring data

More generally on outreach, data shows that cultural content supported through the Sub-programme was accessed by an extremely high number of people. Projects recorded how many times people consumed cultural content including those watching, visiting, listening and viewing cultural activity funded. This data shows that cultural activity was accessed (either virtually or in person) 91.5 million times over the course of 2014-2020 highlighting how the strand stimulated mass participation in culture during this period⁷³. A practical

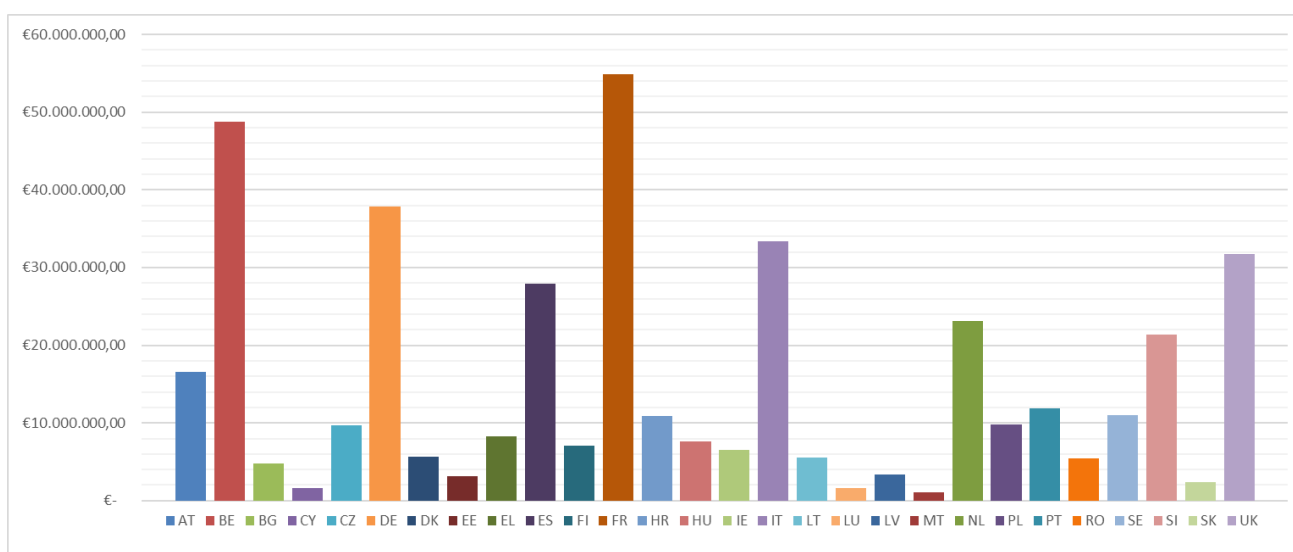
⁷³ Data measures the number of times cultural content supported by the Culture strand was accessed over 2014-2020 on the Support to the Cooperation Projects, the Support to Networks and the Support to Platforms. This data is extracted from the project's final evaluation submitted to EACEA, based on the project reporting on the number of people

example of how the Sub-programme supported access to culture is through the action dedicated to promoting the circulation of European literary works. A budget of EUR 14.7 million was redistributed to 431 projects in the book and publishing sector, resulting in over 3,500 translations of literary works, from around 40 source languages into 30 target languages. Moreover, 70% of the translated languages are coming from “smaller” languages, contributing to the objectives of increased access for EU people to a diversity of works and answering the objectives to support cultural diversity.⁷⁴ It is also worthy to include the results of other distinct actions supported by the Programme, such as the European Capitals of Culture. It is estimated that the average number of visitors of European Capitals of Culture is 2,138,825 per title holder.⁷⁵

Finally, the Sub-programme contributed to the overall EU strategy for cultural diplomacy thanks to its large reach, with 15 participating non-EU countries. Organisations involved in international projects highlighted how the support from Creative Europe helped to cover the additional costs resulting from showcasing their work in non-EU countries, such as transportation of materials, translation, and travel costs (especially when a large number of artists are involved such as is the case for orchestras). With a contribution of EUR 5 million from IPAIII funds, a special call for Western Balkans was published in 2019 on the same model as for the European Cooperation projects, resulting in the selection of 13 projects. As a whole, the Sub-programme funded 444 projects involving 375 organisations located in non-EU countries.

Distribution of support between EU Member States

Total EU funding per Member State in the Culture sub-Programme in CE1



Source: Creative Europe programme monitoring data supplied by EACEA. EU grant awarded by country (coordinators and partners).

watching, visiting, listening and viewing cultural activity funded by the strand. As the data measures the number of times content was accessed meaning a person accessing more than one cultural content will be counted more than once. Data presented excludes extreme outliers from projects reporting figures that significantly deviated from the average.

⁷⁴ European Commission (2022), The playbook of literary translation projects, Publications Office of the European Union, Luxembourg- see [link](#).

⁷⁵ First interim evaluation of the European Capital of Culture (ECoC) action, covering the title-years 2013 to 2022. Publication expected in April 2025.

It should be noted that Creative Europe does not feature pre-allocated envelopes of funding for different Member States. The Programme is based on the principle of excellence meaning that the selection of projects to be funded will depend on their quality whichever the country of origin of the applicant organisations. The allocation of funding through the different grants awarded is influenced by several factors including the size of the countries' CCS, their vitality and the level of national support or lack of it. Some European countries act as geographical hubs (e.g., Belgium) for wider partnerships. Through its international cooperation component, the Programme allows for organisations from countries with less-established CCS to cooperate with organisations from those European cultural hubs.

The data from CE1 show that the Programme supported over 1 200 international projects with 65.3% of them demonstrating a strong emphasis on cross-border collaboration. In turn, these projects created over 7,500 cultural activities. This illustrates how the strand was a key driver of new cultural content within the EU. The Culture Sub-programme provided support, often to small and fledgling organisations, to help beneficiaries capture the opportunities that international work provides, including stronger professional networks and much larger foreign audiences. There is strong evidence that the Culture sub-Programme directly contributed to greater opportunities for cross-border collaboration by funding projects built upon cross-border partnerships.⁷⁶ While acting with a limited budget, the Culture Sub-programme of CE1 contributed to ensuring cooperation, joint creation and production of innovative works and continuous upskilling of the professionals of the sectors, thus increasing their competitiveness and their work's singularity within their sector. As such, the Sub-programme addressed the fragmentation of the cultural sector, provided a platform for numerous projects but has also ensured inclusivity by integrating a wider set of countries into these networks. These are key elements towards the Programme's general objective of competitiveness, notably through skills and methodology development to encourage transformation and innovation.

Creative Europe 2, Culture strand

Over the period 2021-2023, the Culture strand invested EUR 294 million, supporting 630 projects involving 2,176 beneficiary organisations had a strong transnational approach, with 94% of projects having a cross-border component. In addition, it has been observed that the cooperation between partners tends to continue after the funded project has been finalised, according to 72% of the Programme's beneficiaries. The strand also supports the implementation of a new mobility scheme for artists and cultural professionals, as well as four prizes in the fields of architecture, music, literature and cultural heritage.

Mobility

The Culture strand continues supporting the **mobility of artists and cultural professionals in CE2** to allow them to develop their careers at a European level. Although there is a specific Programme indicator in CE2 dedicated to mobility, results are currently incomplete. Data will be collected based on the final reports submitted by the projects once completed (many projects have a duration of four years). For more details, please consult Annex VII. However, as a way to reinforce the Programme's support for mobility beyond national borders, in particular individual mobility, a new action s **Culture Moves Europe** has been introduced in CE2, for which some figures are already available. This scheme, launched in October 2022, supported the mobility of 3,049 artists and the creation of 202 artist residencies accommodating 772 individual artists over the years 2022 and 2023. In

⁷⁶As shown by the Conclusions of the supporting study's Contribution Analysis provided by ECORYS and KEA (p.42-44),

CE2, Culture Moves Europe alone supported 162,678 days of mobility. A survey on 1,159 completed mobility projects under the scheme shows that 97% of grantees pursue further international mobility, **85% develop new outlets, distributors, exhibitors, or audiences as a direct result of their mobility and 76% receive job offers, new contracts, or new project opportunities stemming from their mobility experience.** Additionally, **72% of grantees indicated engaging in new co-productions or co-creations due to their mobility beyond the period of the project.**

Those results, in line with the intervention logic, directly contributed to the increased capacity of CCS to operate at an international level and indirectly to job creation.

Similar results (although not always yet fully measured) were reported in other key schemes of the strand, including **Perform Europe** (tested under CE1⁷⁷ and developed into a fully-fledged action in CE2) and the **various cultural prizes** supported under both iterations of Creative Europe. Although prize holders cannot quantify the impact, most highlight that this increased exposure for their work directly impacted on the number of contracts and commissions, particularly outside of their own country. This increase in the demand for their works is particularly welcomed as most prize holders highlight how their fields are particularly competitive, meaning a prize gives them a commercial platform from which to build their careers. The prize for literature has enabled 189 emerging writers from 41 countries to make a name for themselves thanks to translation into several languages that will not be possible without the visibility of the prize.

Development of skills in the CCS

Similarly to CE1, the development of skills and competences in the CCS remain a priority of the Culture strand in CE2. Evidence shows that the strand has been effective in supporting the **development of skills and competencies of artists and cultural and creative professionals.** Research found that 3,647 participants so far have been involved in learning activities and considered that this support had improved their competencies and increased their employability. Moreover, in 2021-2023, the strand continued funding 37 Networks (with an envelope of EUR 27.6 million), representing more than 4,000 organisations covering all partner countries and more. Over the same period, it supported 16 Platforms (with an envelope of EUR 33.5 million), representing 316 member organisations coming from 38 countries and promoting and helping 3,200 emerging artists. Both the Networks and the Platforms provide capacity-building activities as described in the section above on CE 1. Finally, under a new multi-annual action called “Pan-European Cultural Entities”, the Culture strand funds four pan-European orchestras, which have so far supported 600 emerging artists from over 20 countries, helping them in their transition from education to professional life. All the capacity-building efforts of the Culture strand are corroborated by the results of the Beneficiary Survey, in which three out of four respondents said that the strand has a positive impact in terms of upskilling and reskilling their competencies.

Promoting social resilience and social inclusion

The Culture strand has so far invested EUR 50.7 million in cooperation projects where social inclusion and intercultural dialogue was identified as a priority.⁷⁸ Although data on

⁷⁷ The pilot supported 85 partners who delivered over 250 touring performances.

⁷⁸ This theme became a specific objective in its own right in Creative Europe 2, which was not the case in the first iteration of the Programme. However, monitoring data show that 1 106 activities had a focus on diversity and inclusion under CE1.

how many individuals from socially excluded groups have accessed support from the Programme is not yet available, interviews with projects as well as desk research show that many funded projects focus on societal issues such as exclusion, poverty, racial hatred, inequality, violence and isolation. Perform Europe, which supports cross-border touring within the performing arts sector, through its particular emphasis on inclusivity and fairness, is a good example of this endeavour. This scheme has so far supported 250 performances and 42 transnational partnerships. According to the Beneficiary Survey, 81% of projects said that the Culture strand was helping them address social inclusion challenges through the cultural activity supported. As was already the case under the first iteration of the Programme, CE 2 prioritises support for non-traditional players in the cultural field including grass-roots community organisations and those who have close links to disadvantaged groups. The intense level of cross-border collaboration (2,500 partners so far involved in international projects under CE 2) has led to high levels of intercultural dialogue taking place across different countries on projects often with a focus on key social themes, including diversity and equality. This contribution of the Programme in the promotion of societal resilience and social inclusion is particularly illustrated by Programme KPI 4.

Indicator	Baseline in 2020	Achieved value in 2023	Target by 2027
KPI IV: Number of projects supported by the Programme addressed to socially marginalised groups	37	127	279

Participation of third countries

As was the case under CE 1, the Culture strand continues supporting the Union's global strategy for international relations,⁷⁹ with a total of 372 projects involving third-country organisations over 2021-2023.⁸⁰ This data is collected under Programme KPI 3. This represents 20% of the projects funded under the Culture strand. Although it is difficult to measure the impact of this work in terms of strengthened international relations (particularly at this early stage of implementation of the Programme), stakeholders highlighted how the Culture strand was providing a cultural dimension to international cooperation and helping to build (cultural) bridges between the EU and the rest of the world. In addition, the Culture strand has shown its ability to respond to international emergencies, notably the Russian war of aggression against Ukraine, by publishing a EUR 5.0 million budgeted special call aiming to support Ukrainian CCS, resulting in the selection of three consortia that redistributed funding to organisations on the ground.

Indicator	Baseline in 2020	Achieved value in 2023	Target by 2027
KPI III: The number of projects supported by the Programme involving third countries organisations	58	372	432

Distribution of support between cultural and creative sectors

⁷⁹ See previous footnote.

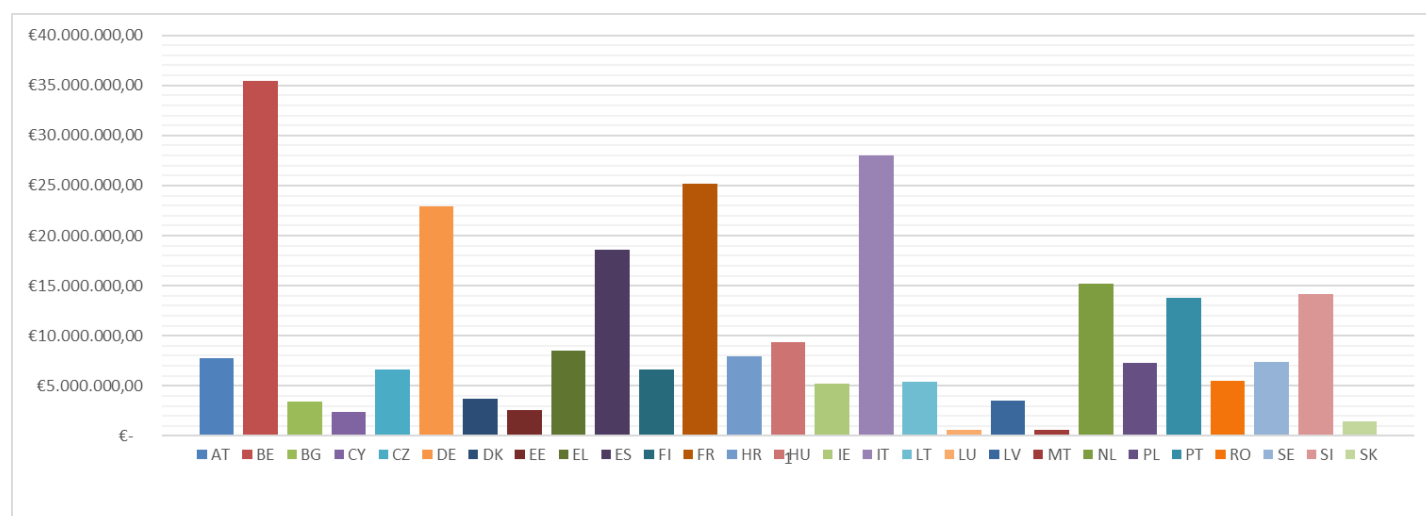
⁸⁰ MFF Performance Results Reports (page 584)- see [link](#).

The Culture strand supported a **wide variety of CCS**. Monitoring data highlight that funding has so far been distributed across 22 sectors (with the previous iteration of the Programme showing very similar patterns) and that music, art in public spaces, theatre and cultural tangible and intangible heritage have received most of the support. The distribution of funding across sectors generally reflects the make-up of the overall CCS in the EU with the largest sectors (in terms of employment) receiving the largest share of funding, with no sector receiving a disproportionate amount of funding.

Distribution of support between EU Member States

In terms of the geographical distribution of funding, the main countries benefitting from the support are France, Italy, Germany and Belgium (with Belgium being prominent because many pan-EU organisations are located there while they have a pan-European reach covering many participating countries). Together these four countries received around a third of the Culture strand funding across both Programme periods, with Spain, Slovenia and Austria also getting a notable share of the support distributed. The graph below shows that there is a slight difference between CE1 and CE2: although data for CE2 only goes up until 2023 there is evidence that countries with a relatively smaller number of professionals and organisations, such as Denmark, Lithuania and Bulgaria are starting to comparatively receive a higher share of support from the Programme. The total funding per EU Member State and Programme period is as indicated in the following figure.

Total EU funding per Member State in the Culture strand in CE2



Source: Creative Europe Programme monitoring data supplied by EACEA. EU grant awarded by country (coordinators and partners). Data cover projects contracted under calls 2012 to 2023.

As was already the case in CE1, CE2 does not feature pre-allocated envelopes of funding for different participating countries. Even if the distribution of funding above displays that the size of country's CCS remains a strong influence on the redistribution of funding through the different grants of the Culture strand, there is a notable shift in the geography of collaboration. France is not the main receiver of funding anymore, while Belgium confirms its status as a hub for Culture projects (Particularly for Networks and Platforms,

but which can redistribute budget through cascading grants with actions such as Perform Europe or the above-mentioned Platforms).

CE 2 has demonstrated an even stronger emphasis on cross-border collaborations, with an increase in the proportion of projects with an explicit cross-border component reaching 83.1% in CE 2. The data also indicates that CE 2 projects involve a higher average number of partners and countries compared to CE 1, suggesting an evolution towards larger and potentially more complex networks. It is noticeable that in Creative Europe 2 there is also some evidence that countries with a smaller number of professionals and organisations, such as Denmark, Lithuania and Bulgaria are starting to comparatively receive a higher share of support from the Programme. A shift in the geography of collaboration has also been noticed, with some new countries, such as Croatia, Slovenia and Serbia, playing a more prominent role in CE 2 compared to CE 1, while the UK, a key player in CE 1, is absent post-Brexit.⁸¹

Building on CE1's successes, the Culture strand of CE2 further develops its role in fostering cooperation, joint creation and production of innovative works, thus tackling the fragmentation of the sector. Its actions further contribute to the mobility and continuous upskilling of the professionals of the sectors while encouraging knowledge-sharing among them. Consequently, the strand plays its role in answering the Programme's general objective of competitiveness regarding the CCS and their professionals.

Efficiency

Creative Europe 1, Culture Sub-programme

The impact and benefits of the Culture Sub-programme in relation to the CCS are not always easily quantifiable due to the difficulty of monitoring such segmented sectors and considering the (relatively) limited budget of the strand. In fact, with a small budget and limited Full Time Equivalents (FTEs) involved (for example 37 FTEs in 2019 and 39 in 2020 in EACEA), the Culture Sub-programme cannot claim to have a structuring impact on the many sectors covered and in all the participating countries, going beyond the funded organisations themselves. Nevertheless, the overall resources distributed through the CE1's Culture Sub-programme appear to be proportionate and efficient at delivering the range of intended results and impacts.

Potential means to increase efficiencies in the delivery of the Culture Sub-programme were identified over the 2014-2020 period. The Impact Assessment accompanying the Commission's Proposal for a Regulation establishing the successor to the 2014-2020 Creative Europe Programme also indicated that the large volume of small grants, while having the advantage of supporting many small beneficiaries and activities, "created high administrative costs with time and effort focused on processing calls for proposals and transactions". The CE1 regulation specified that the financial contribution from the Programme should be a maximum of 80 % of the costs of the operations supported, and it appears that over the period the Culture Sub-programme's average co-financing rate was 54%. Overall, the average grant amount was EUR 279,466, while the median grant was EUR 196,406. On average, the duration of projects (and associated grants) under CE1 was of 22.7 months. Finally, 3,194 unique organisations throughout the different CCS were supported.

⁸¹As shown by the supporting study's Contribution Analysis provided by ECORYS and KEA (p.24).

The main action of the Culture Sub-programme is the support for Cooperation projects, which represent 63.5% of its available budget. This scheme funds a broad scale of transnational projects for cultural and creative organisations with a lump sum payment. Submitted projects were either small-scale (at least 3 different organisations in min. 3 different countries; maximum grant of EUR 200,000 representing 60% of eligible costs) or large-scale (at least 6 different organisations in min. 6 different countries; maximum grant of EUR 2 million representing 50% of eligible costs). Under the Sub-programme, a total of EUR 290,024,012 was awarded to 619 cooperation projects: 491 small-scale projects with an average grant of EUR 187,911, and 128 large-scale projects receiving an average grant of EUR 1,544,997. The average number of partners for this action was 5.8 organisations, which highlights the important gap between the two categories. This has been taken into account in the design of the continuation of the action under CE2 with the addition of a third, medium-scale category.

Under CE1, the **Networks** action redistributed a total of EUR 40,161,020 through 181 grants, with an average grant of EUR 262,490. The **Platforms** action redistributed EUR 39,974,713 through 81 grants, with an average grant of EUR 493,595. Under CE1, calls for Platforms and Networks were published on an annual basis, which was not efficient and was therefore corrected under CE2.

The support to **literary translation projects** was the Sub-programme's smallest scheme by volume of funding (on average EUR 3.5 million per year in 2014-2020) and average grant size, but it was the second largest by the number of projects (431). The action redistributed EUR 24,357,222 in grants to 222 organisations. In CE1, the action was divided into two types, the framework partnership agreements and the two-years projects, which respectively had average project grants of EUR 78,255 and EUR 49,993 (combined average of EUR 55,935).

Under CE1, a total of 5,640 eligible proposals were submitted to the different calls published by the Culture Sub-programme, which had an average success rate of 55%. The majority of the submitted proposals concerned the main action of the Sub-programme, i.e. Cooperation Projects, which had a success rate of 20% for smaller-scale projects and 23% for larger-scale projects. Nevertheless, the success rates over the period improved, rising from a low of 14% in 2014 and 2015 up to 30 and 32% in 2020 due to changes in the eligibility criteria introduced in 2018. The support to literary translation had a success rate of 32.35% during the overall period for the two-years projects and 88% for the framework partnership agreements. The Networks action boasted a success rate of 91.7%, while the Platforms action had a success rate of 72.5%.

Creative Europe 2, Culture strand

Reflecting (but only to some extent) the increase in the budget and therefore in the associated expectations, the number of human resources dedicated to the implementation of the Culture strand of CE2 in EACEA was slightly raised, reaching 43 FTEs in 2021, 45 in 2020 and 47 in 2023.

On implementation, based on feedback received on CE1, the Culture strand of CE2 has been adapted to introduce simplified forms of funding. More especially, this involved the introduction of Multi Annual Financing (MAF) arrangements in place of Framework Partnership agreements to reduce the volume of applications for multi-year projects. Previously for a 3-year Framework Partnership Agreement (FPA), the beneficiaries would have to make 3 applications and submit 3 reports. Since the introduction of multiannual

commitments, each beneficiary now makes 1 application for a 3-year project and submits 3 reports, significantly reducing the number of applications and the associated volume of time spent on processing. In the Culture Strand, MAF was introduced for the Networks and Platforms actions.

In parallel, CE2 introduced a system of simplified grants, including lump sum grants and cascading grants. These changes have generally been viewed as important steps to ensure that the Programme is delivered in an efficient way, particularly given the generally limited financial and organisational capacity of CCS organisations. Cascading grants models were used for the Platforms action, the special action for the support to the Ukrainian CCS, Perform Europe, Culture Moves Europe and Music Moves Europe calls. In cascading grants, larger organisations selected through an open call for proposals receive a larger grant. This in turn is distributed through smaller grants to smaller organisations as well as individuals, thereby reducing the number of organisations that have to contract directly with the Commission, enabling greater flexibility and less paperwork for most beneficiaries.

These burden reduction and simplification measures contributed to a reduction in the average time to grants for beneficiaries. The average time to grant for Culture has reduced from 300 days in the first year of the new system (2021) to 238 days in 2023, which is nearly 30 days shorter than the average time under the previous Programme.

At the strand level, there is an overall trend for, on average, both larger and longer grants. In 2021-2023, the average amount awarded per grant across the whole strand was EUR 430,476, which is considerably higher than the average grant amount under CE1. The median grant under CE2 is EUR 199,998. This is at a similar level to the median grant awarded under the previous Programme. At the same time, the duration of projects (and associated grants) has increased to 28.8 months under CE 2. The larger grant sizes, longer time frames, as well as the use of cascading grants in certain actions are likely to have led to enhanced efficiency and impact of the projects supported. However, it is too early to fully assess the effectiveness of CE2 due to the extended duration of the projects in the absence of a critical mass of completed projects by end-2023. This is reflected for example in the incomplete Programme KPI 2 on mobility and KPI 5 on the visibility of the Programme.

The Culture strand of CE2 has been re-adapted to make it more efficient and flexible in its delivery of financial support. The European Cooperation projects remain the largest action of the Culture strand, by volume of funding and number of projects. On average, European Cooperation Projects had a budget of EUR 63.2 million per year. CE2 introduced more flexibility in the design of the projects in CE2 with the addition of a medium-scale category. Under this new category, projects must be constituted by 5 entities in 5 different countries and can receive a grant of up to EUR 1 million, covering up to 70% of eligible costs. The requirements concerning the number of participants for the large-scale Cooperation Projects have increased in CE2, with a minimum of 10 partners in 10 different countries requested. Under CE2, a total of EUR 193,275,907 has been distributed so far across 429 projects. The average grant size for small-scale projects is now EUR 193,677, i.e. a 3% increase from CE1, whilst for large-scale projects, it is now EUR 1,924,583, representing a substantial 25% increase from CE1. This has opened space for medium-scale projects, which have an average grant size of EUR 891,260 (this is 58% the size of previous large projects but four times more than smaller projects).

The **shift towards longer and larger project grants** is also reflected in the European Networks and Platforms actions. In CE2, a total of EUR 28,325,472 has been distributed so far across 37 Network projects and a total of EUR 33,355,091 across 16 Platform projects. This equates to average grants of EUR 765,553 for Networks and EUR 2,084,693 for Platforms, i.e. increases of 77% and 36% respectively. MAF allows for a longer-term perspective for both the supported organisations and the professionals of the sectors, who see these organisations as being more stable. The same model of funding has been chosen for the Pan-European Cultural Entities action, which supports 4 orchestras.

There has also been a consolidation and simplification of the approach to the “Circulation of European Literary works” action under CE2. The two types of projects previously eligible for funding have been merged into a single action, which has distributed EUR 16,553,060 across 134 projects, i.e. an average grant of EUR 123,530 (an increase of 121%). Projects now have an average duration of 28 months, with most projects lasting over two years and some up to four years. For the first time, minority and regional languages were made eligible in CE2, to better support the Programme’s objective of promoting linguistic diversity.

The stakeholder consultations suggested that the increased size of the Creative Europe 2021-2027 budget⁸² has only gone a small part of the way to addressing the significant challenges created by inflation and rising costs in recent years. Several consulted stakeholders highlighted that inflation had made staffing and operational expenses difficult to manage within the allocated budget, despite the improved rate of co-financing. Stakeholders stated that some parts of the sectors were particularly hit by much higher energy prices (particularly large cultural venues, including museums, galleries and theatres), but also increases in other costs (e.g. raw materials needed for production). Analysis of the impacts of inflation tends to confirm stakeholders’ views that grant sizes have generally not kept up with price increases. In 2022, EU annual inflation reached a high of 9.2%⁸³. A price deflator, which takes into account EU inflation rates in 2021 and 2022, reduces the median grant amount from EUR 199,998 to EUR 178 093, which is significantly lower than the previous Programme’s median value of EUR 196,406⁸⁴.

The Culture strand of CE2 sought to improve sectors’ accessibility to the Programme by increasing the ceilings on co-financing and increasing the share of support provided. In this context, taking into account the challenges associated with COVID-19 and the need to ensure accessibility to the Programme for smaller CCS organisations, higher co-financing rates were also introduced in the CE2. The lower own resources levels necessary to apply under CE2 were therefore welcomed as an important improvement. For instance, the co-funding rate for the different categories of European Cooperation projects increased to 80, 70 and 60% for the small, medium and large-scale Cooperation projects respectively. As a result, during the first three years of CE2, the average co-financing rate for the Culture strand was 77%. The change was even more useful as some stakeholders emphasised the difficulties encountered in securing public national/regional/local or private co-financing under the CE1 period especially in Central and Eastern European countries.

⁸² For more details, consult chapter 3 of the SWD.

⁸³ Data extracted from Eurostat: [Annual inflation more than tripled in the EU in 2022](#), published 9 March 2023

⁸⁴ A price deflator of 112.3 is applied taking into account the average inflation rates across the EU of 2.9% in 2021 and 9.2% in 2022.

There is some indication that the **increasing grant sizes and higher co-financing rates led to an improvement in accessibility to the Programme's Culture strand when measured by the numbers of project partners.** This is particularly relevant as the sectors targeted by the actions are characterised mostly by micro, small and medium sized entities. The Programme monitoring data suggests that there was a significant increase in the number of unique organisations supported by the Programme as the average number per year is 746 under CE2 compared to 508 under CE1. The picture is less clear however when specific actions are compared. Under CE1, the European Cooperation Projects action had the highest average number of partners per project at 5.8 in comparison to 5.3 under the current Programme, due to the introduction of the medium-scale category for this action.

The budget for CE2's Culture strand has allowed the Programme to allocate funds in line with the original request set out in the grant application and beneficiaries were largely satisfied with the amounts received. Under the Culture strand, the average grant of EUR 432,224 awarded to projects compares to an average of EUR 436,125 requested by successful applicants, meaning 99% of the requested budget was awarded. The rate is very similar across all the strand's actions. The ratio of budget awarded to budget requested was at a similarly high level under CE1. In addition, taking the concerns reported by stakeholders in relation to inflation into account, most respondents to the beneficiary survey (87%; n=688) thought the allocated budget under the Culture strand of CE2 was fully (65%; n=490) or somewhat sufficient (25%; n=198) to achieve their planned results, whereas only 9% (n=68) of respondents viewed the budget allocated to their project as not enough to achieve their planned results, and 5% were unsure (n=37).

Coherence

The current CE2 strand is largely an evolution from the approach and activities under the Sub-programme of CE1 and the transition between the two iterations has been fluid, as illustrated by the high level of continuity in beneficiaries. **Since CE1, the Culture strand has strengthened its coherence** with a broader set of objectives, by increasing funding for the Platforms and Perform Europe schemes, launching Culture Moves Europe and complementing the horizontal instruments with a sectoral approach.

The design and implementation of the Culture strand appear to be well aligned with the general and specific objectives, and the priorities envisaged for the strand by the regulation.

The horizontal and sector specific actions appear to provide a flexible framework that enables the scheme to engage with the broad diversity of CCS organisations that are covered by the regulation. The concentration of support under the European Cooperation projects and other horizontal actions can mean that there is a directive approach to the design and outcomes of projects in support of the objectives of the Programme. This includes a greater degree of evolution in the design of calls and priority topics or expected results. However, the core characteristics of supporting European level collaboration and mobility for cultural and creative sectors is well realised. Sector-specific calls have enabled a more targeted approach to specific topics but could increase the potential for duplicating results and efforts across actions.

The Culture strand is **coherent with EU, national and international initiatives** and opportunities in support of the cultural and creative sectors. The Culture strand supports the implementation of EU policies and initiatives targeting the CCS, in particular the New European Agenda for Culture while also being in line with the ambitions of the New

European Bauhaus through projects and activities that contribute to the initiative 's objectives.

EU programmes such as Horizon Europe, Erasmus+, CERV, the RRF, and the ERDF are complementary to the objectives of the Culture strand, which remains the only EU funding source dedicated specifically to culture. RRF, ERDF and Interreg support culture and heritage across the Union by providing country-specific support. Some Member States have directed support for the CCS via both the RRF (EUR 11.7 billion, across 18 Member States) and the ERDF (over EUR 9 billion across 22 Member States for the objective on culture and sustainable tourism) to support the dual transition of CCS buildings, digitalisation of cultural content, construction/restoration of cultural venues, as well as protection, development and promotion of cultural assets. Regarding Erasmus +, in response to the COVID-19 pandemic, a specific call was held under the 2020 Call of the Erasmus+ Strategic partnerships, called 'Partnerships for creativity', with the allocation of an indicative EUR 100 million budget to address the priority "Skills development and inclusion through creativity and the arts". In the CE2, areas of synergies are found in the Erasmus+ projects supporting skills for the arts and cultural sectors, for architecture and design and the fashion sector. Culture Moves Europe mobility scheme under Creative Europe is complementary with learning mobility under Erasmus+, as they address different target groups and Culture Moves Europe excludes any projects related to the school or academic curricula.

For instance, while innovation is included in the Culture strand's specific objective, this is operationalised through encouraging the adoption of new technologies, rather than their development. The Horizon Europe Programme complements this focus with support for research and development within the CCS, which have the potential to be supported under all three pillars, through actions supporting social science and humanities in Pillar 1 (Excellent Science); the cluster 2 on "Culture, Creativity and Inclusive Society" included in Pillar 2 (Global Challenges and European Industrial Competitiveness) and the support to the European Institute of Innovation and Technology Culture & Creative Knowledge and Innovation under Pillar 3 (Innovative Europe). RRF, ERDF and Interreg are also key in supporting culture and heritage across the Union, complementing Creative Europe by providing country-specific support. Some Member States have directed support for the CCS via both the RRF (EUR 11.7 billion, across 18 Member States) and the ERDF (EUR 5 billion for the objective on culture and sustainable tourism) to support the dual transition of CCS buildings, digitalisation of cultural content, construction/restoration of cultural venues, as well as protection, development and promotion of cultural assets. The CERV Programme aims to protect and promote the rights and values of individuals and mentions complementarity with the Creative Europe Programme in its multi-annual work programme. The Culture strand in particular complements CERV through its priorities to strengthen European values through cultural awareness and to promote social inclusion and intercultural dialogue, while CERV Programme's second pillar is particularly relevant for the CCS, with its focus on promoting citizen engagement and participation, as well as raising awareness on common European history. To support the efforts of applicants to identify other sources of funding relevant to Cultural and Creative organisations, Creative Europe has supported under its Culture strand the implementation of the CulturEU Funding Guide⁸⁵ an online platform to redirect applicants to different sources of EU support suited for their needs.

⁸⁵ <https://culture.ec.europa.eu/funding/cultureu-funding-guide>

Although the Culture strand shares objectives and funding opportunities with national and international schemes, **these are typically focused on specific sub-sectors or individual countries.** Moreover, few other schemes provide comparable support for mobility and cooperation. For this reason, the Culture strand - particularly the European Cooperation Projects action at its core – is coherent with national and international support mechanisms, offering funding for areas that are often underrepresented elsewhere.

Overall, the Culture strand of the CE2 Programme is largely coherent with other initiatives in support of CCS at national, EU, and international level. Creative Europe support targets areas that are not well supported through other means — there is limited overlap with other support mechanisms.

The Culture strand also supports areas that are strategic for the EU's priorities for CCS. Horizontal EU principles related to digitalisation, sustainability and inclusion have been integrated into award criteria and action priorities. The strand could more explicitly support these principles through criteria that incentivise addressing these areas, in particular the development of green skills.

4.1.3. Cross-sectoral strand

The cross sectoral strand aims to strengthen collaboration in the cultural and creative sectors to respond to challenges and opportunities that are common to all cultural and creative sectors. Also, since 2021 support is provided to the news media sector, as a crucial component of Europe's diversity and democratic debate. It also supports the Creative Europe Desks network, which promotes the Programme and provides assistance to potential applicants.

Finally, it supports communication activities to increase awareness and raise the visibility of the Programme, as well as studies and data analysis for policy making.

The CE2 legal base establishes the following monitoring indicators: The number and scale of transnational partnerships formed (composite indicator for the 'creative innovation lab' action and cross-cutting actions that support the news media sector); The number of participants in the 'creative innovation lab' action and cross-cutting actions that support the news media sector, indicating the proportion of women. The targets are on track to be met.⁸⁶

As the creative innovation lab & news media actions are new actions, these indicators are adequate to analyse the impact in quantitative terms for now. The number and scale of cross-border partnerships provide an insight into the impact these actions can have on the wider news sector. For the journalism partnerships, it is also useful to analyse the geographic location of direct and indirect beneficiaries, to understand whether they are from countries with high, medium or low levels of risk to media pluralism. For indirect beneficiaries, only 2021 data is available, which is analysed in a case study on effectiveness. At a later stage, more qualitative assessments may help understand the extent to which they helped change business models, content formats and media literacy practices across Europe.

Potential additional indicators could be explored but may require third party data and/or increased reporting obligations by beneficiaries, including after the project finished. The

⁸⁶ Precise figures are provided in Annex VII

feasibility of these approaches thus needs to be carefully studied further. As regards news, these could be the geographic location of direct beneficiaries aggregated by risks assessed in the Media Pluralism Monitor hence increasing the number and scale of transnational partnerships and the number of participants. Total audience reach and engagement in supported actions could be another indicator. As regards Innolabs, similarly to the Innovative tools action, additional data could be collected on the number of active users.

News

Effectiveness

Support to news media organisations involve **cross-border collaborations** among media organizations through **journalism partnerships**, actions promoting **media freedom and pluralism**, and since 2022, **media literacy activities**.

Initial results of novel news media actions under CE2 are promising. The news media sector is a crucial component of Europe's diversity and democratic debate. The news media actions respond to the specific objective to promote a diverse, independent and pluralistic media environment as well as media literacy. In this initial stage, with a small annual budget of about EUR 15 million, as the news media actions are new, key performance indicators focus on participation in quantitative terms. The high number and scale of cross-border partnerships provide an insight into the impact these actions can have on the wider news sector: there have been 43 project consortia with 224 partners over 2021-2023.

While funding is limited, there are indications that it is well targeted on areas where it is most needed. The projects funded through the Journalism Partnerships provide training and capacity development to foster innovation in content creation as well as in viable business models. Indications of effectiveness can already be found in the final reports for the 2021 Journalism Partnerships that provide grants to third parties, to see if they are from countries with high, medium or low levels of risk to media pluralism. An analysis of the 2021 cohort shows, for example how the projects on '*Cross-Border Local*' (managed by Journalismfund.EU) and '*Media Innovation Europe*' (managed by the International Press Institute) targeted risks to news media. Together they distributed €1.2 million to 194 media projects, with grants up to EUR 44,000. A large majority of their funds focuses on countries where there are high risks to media plurality as identified by the Media Pluralism Monitor. 28% of their funds were spent on medium risk countries and 72% on high-risk countries. The average subsidy per inhabitant was 3 times higher in high-risk countries.

Support for media pluralism has funded independent monitoring of risks and to supporting awareness-raising activities. The Media Freedom Rapid Response (MFRR) mechanism tracks violations of press and media freedom and includes safety training for journalists. In 2021, 1373 violations were verified and 346 requests for support received, 117 cases were treated. '*Media councils in the digital age*', a project that supports exchanges between media councils on journalistic deontology, is essential for news media viability. The Media Pluralism Monitor assesses the risks faced by media pluralism based on a set of 25 key indicators. The Media Literacy action aims to enable citizens to use, and develop a critical understanding of, the media and to support knowledge sharing and exchanges on media literacy policies and practices. It has been implemented through two calls in 2022 and 2023 supporting 13 projects with a total of 62 partners. Both calls

expected to support European consortia that can develop best practices, notably through training and educational content to be used by third parties.

Since 2022, support for cross-border media literacy projects help. The target groups are split mainly between projects targeting children/young people, seniors or vulnerable groups and professional groups, including media literacy professionals. Results from the beneficiary survey suggest that the calls are likely to be most effective in enabling knowledge sharing on media literacy and supporting partnerships for systemic collaboration between media organisations. Based on feedback it is also likely that these projects will contribute to improving the quality and trustworthiness of news content.

Despite the above positive developments, it is however too early to draw robust conclusions on the impact of the novel news media actions. Overall, analysing the effectiveness of these recent news media actions in contributing to a pluralistic media environment would require a larger longitudinal analysis to assess the extent to which they helped change business models, content formats and media literacy practices across Europe.

Efficiency and simplification

The approach to designing news media funding has helped to minimise administrative overheads. Support to news media was provided in particular through funding of cross-border journalism partnerships which were awarded through annual, competitive calls for proposals. Between 2021-23 about EUR 34 million was awarded to a total of 27 cross-border partnerships, representing 146 beneficiaries. The average grant size was over EUR 1 million, which is significantly above the Creative Europe average. At the same time several of these projects implemented also support to third parties. For example, in 2021, 30% of the EU grant awarded was transferred to a total of 248 third parties.

However, increasing applications and a decrease in already low success rates call for careful monitoring going forward. Applications rose from 30 in 2021 to 106 in 2023 and the success rate therefore declined from the success rate is 18.5% to 10% in 2023. Given the low success rate, these actions will need to be monitored closely to assess if eligibility criteria or award criteria need to be narrowed down or if the budget allocation can be increased.

Action	Year	Success rate
Journalism Partnerships	2021	22%
	2022	19%
	2023	11%
Media Literacy	2021	NA
	2022	33%
	2023	18%

Coherence

News media support addresses a distinct yet limited set of topics in relation to media pluralism, freedom and literacy not dealt with in previous programmes. These objectives align with the general objectives of diversity and freedom of expression, as well as competitiveness dimensions. Further expansion of support in the context of Creative Europe would benefit media pluralism and societal engagement more broadly.

The actions are closely aligned with other EU policies and initiatives, principally the Audiovisual Media Services Directive, the European Media Freedom Act, the “News initiative” under the Media & Audiovisual Action Plan, and the European Democracy Action Plan. Notably, support to the news industry contributes to its viability and pluralism across the single market. Also, funding is provided for the functioning of the European Board for Media Services established by the EMFA.

However, some barriers to exploiting synergies exist. The Citizens, Equality, Rights and Values Programme (CERV) aims to protect and promote the rights and values enshrined in the treaties by supporting civil society organisations, in order to sustain open, democratic and inclusive societies. Yet, media organisations are excluded from CERV grants. An attempt to pool resources between CERV and CE under a joint action could not be accomplished due to the differing legal bases, undermining the potential for synergies between the two Programmes.

The Horizon Europe Programme has offered limited support for innovation in the news media industry. Cluster 2 (on Culture, Creativity and Inclusive Society, and specifically under the destination ‘Democracy & Governance’) and cluster 4 (on digital, industry and space) included some actions related to the media and news media sectors, focusing on innovative approaches to fighting disinformation, enhancing media and digital literacy, and the use of VR/AR.

Overlaps are most prominent for media literacy, between Erasmus+ and Creative Europe. There are several examples of projects being supported under Erasmus+ that have directly supported media literacy objectives, plus projects on closely related topics of mis and disinformation, digital literacy and online safety.

News media actions complement national support while contributing to a broader, transnational impact, in line with the added value outlined in the Programme regulations, thereby contributing to the implementation of the European Media Freedom Act. Creative Europe support to news media provides opportunities for cross-national collaboration in these areas, including capacity-building activities, knowledge sharing, and the exchange of best practices. More importantly, it adds an important layer of protection and analysis to media pluralism that goes beyond national efforts. By funding the Media Pluralism Monitor, the strand enables independent, comparative assessments of risks and challenges to media pluralism across the EU and participating countries – outcomes that cannot be achieved through national measures alone. Additionally, the Rapid Response Mechanism, funded through the same strand, plays a crucial role in identifying and responding to emerging threats to media freedom. In doing so,

Cross sectoral collaboration among CCSs: Creative Innovation labs

Effectiveness

The Innovation Labs help digital transformation in the Audiovisual and cultural and creative sectors, by supporting experimental production, distribution, and monetization models, it directly contributes to EU priorities for innovation in the audiovisual and CCS sectors.

Following initial difficulties in implementation, the action was recalibrated in 2023 to align it better with its objectives. The Innovation Labs initially struggled with unclear objectives, misaligned priorities, and low-quality applications. In 2021, only 10 out of 43 proposals met the evaluation threshold, as external experts criticized their lack of innovation and weak cross-sectoral approaches. In 2023, the action was reviewed with a focus on the use of tech solutions, stronger cross-sectoral cooperation, and better alignment with industry needs. Despite significant improvements, challenges remain. Future calls will continue refining criteria to ensure that funded projects are genuinely innovative and contribute to the long-term digital transformation of both the AV and cultural industries.

Efficiency

In view of increasing applications, action was taken to safeguard the Programme's efficient implementation. As regards the Innovation Lab, projects were awarded a total of approximately EUR 20,500,000 at an average of EUR 624,000 per project. This grant size is above the average for similar projects under MEDIA and indicates a good level of efficiency. However, there was a rise in applications from 43 in 2021 to 101 in 2023 and the success rate declined sharply from 23% in 2022 to 6% in 2023. Therefore, the eligibility and award criteria were clarified, in order to avoid a high number of applications of low quality and therefore avoid costs for applicants and the Programme administration.

Coherence

Despite some potential complementarities, there is a need to reinforce synergies with Horizon Europe and the European Institute of Innovation and Technology (EIT). There appears to be complementarities between the Creative Innovation Labs action, Horizon Europe and the EIT. However, unlike Horizon Europe, the Lab supports practical implementation of cross-sectoral projects that provide interdisciplinary approaches, tools and solutions by SMEs, artists, and creative industries emphasizing digital transformation, new distribution models, and innovative content monetization. Actually, the vast majority of the companies supported in 2023 and 2024 by the Labs had never been supported by these other Programmes. With rapid advancements in digital transformation, this type of action is relevant in addressing the evolving needs of the cultural and creative sectors but should reinforce complementarities with other EU-level initiatives to optimize resource allocation and impact.

Creative Europe Desks

Effectiveness

The Creative Europe participating countries increased from 30 at the beginning of the Programme in 2014 to 40 in 2023. The Creative Europe Desks are hosted by 71 organisations in all participating countries and are the gateway to the Creative Europe Programme on national level.

Feedback from stakeholders and beneficiaries suggests that the events and activities offered by the Creative Europa Desks have successfully achieved the Desks' objectives on promoting the Programme and supporting potential beneficiaries.

The Desks appear to be the principal source of information for applicants, particularly new applicants, and the information and support provided is generally valued by beneficiaries. According to the Beneficiary Survey, most beneficiaries were aware of the Desk prior to making their application (80%). It was their most important source of information when writing the application itself for 53% of respondents and was a secondary source for 34%. The quality of information from Creative Europe Desks was generally considered good or very good by 79% of respondents and was considered the best source of information by respondents.

The Creative Europe Desks have organised a large volume and a wide range of training activities. Activities include workshops on calls and application processes, information sessions, pitching sessions and networking matchmaking events, masterclasses, as well as lectures and conferences. Under CE2, an indicator was added measuring the number of events organised by the Desks. The results by 2023 show that the Desks activities have already reached the target for 2027.

Indicator	Baseline 2020	Result 2023	Target 2027
Number of events or activities promoting the Programme organised by the Programme desks	400	2,796	2,800

Evidence was more limited regarding the Desks' activities supporting the communication of the results of the Programme. Desks have organised events in relation to this priority, including events promoting and disseminating the results of Creative Europe. However, these appear to be a relatively smaller share of activities in comparison to the primary role of raising awareness about opportunities through Creative Europe and supporting potential applicants.

Efficiency

As outlined in the effectiveness section above the Creative Europe Desks play an important role in informing national CCS organisations about the Programme and in supporting prospective applicants. The Desks are seen by applicants as an important source of reliable information. Although some variations in the capacities of the Desks were noted, this evaluation does not have sufficient data to provide a comparative assessment, and overall Desks appear to be an effective and efficient way of engaging target groups at the national level.

The shift to lump sum grants is expected to reduce the administrative burden associated with the funding of Desks.

As described above in Ch 2, the amount of funding allocated to the Desks pr year has increased slightly from CE1 to CE2. This rise in the annual budget for the Desks appears to be reasonable considering the high rate of inflation in the 2021-23 period. The volume of assistance required from Desks, including the size and number of applications and subsequent beneficiaries, has also increased, even if a much greater proportion of smaller

projects were supported in the previous Programme (particularly under the MEDIA Sub-programme).

4.1.4. Financial Instruments

The Cultural and Creative Sectors Guarantee Facility (CCS GF) was established to facilitate access for the sectors lending from financial institutions. Impact assessments had estimated the financing gap at EUR 837m – EUR 2.07bn per year². At its launch, the initial objective for the CCS GF was to cover 10 Member States through guaranteed agreements signed with 10 Financial Intermediaries, in order to mobilise EUR 600 million of financing and achieve a target leverage effect of 5,7. All these targets were exceeded. There are good indications that not only did the scheme partially closed the gap in lending for the CCS but has also demonstrated that the CCS can be an attractive and sustainable lending proposition.

In terms of implementation,⁸⁷ all the main KPIs were exceeded. In line with Article 18 of the regulation (EU) No 1295/2013, the Commission should monitor the performance of the CCS GF based on the following indicators: the volume of loans guaranteed in the framework of the Guarantee Facility, categorised by national origin, size and sectors of SMEs and micro, small and medium-sized organisations; the volume of loans granted by participating financial intermediaries, categorised by national origin; the number and geographical spread of participating financial intermediaries; the number of SMEs and micro, small and medium-sized organisations benefiting from the Guarantee Facility, categorised by national origin, size and sectors; the average default rate of loans; the achieved leverage effect of guaranteed loans in relation to the indicative leverage effect (1:5,7).

The CCS GF uptake has been impressive. During the CCS GF implementation from 2016-2020, 22 Financial intermediaries (banks or guarantee institutions) operating in 22 countries signed an agreement with EIF, underpinned by a financial commitment of EUR 237 million. These agreements generated 9,458 loans for 7,117 SMEs for a total of EUR 1,818 million in loans generated, which exceeded by far the initial goal. These results were achieved thanks to the additional funding channelled to the CCS GF (EFSI top-ups of EUR 130 million in total), and the increased leverage effect (7,7 vs the initial objective of 5.7). 59,533 jobs were estimated to be supported thanks to these loans. The loans covered by the CCS GF are generally performing well, with only a 1.1% default rate, on par with other economic sectors.

The CCS GF intervention has been balanced and diverse. There has been a reasonable geographic spread of beneficiaries. Spain, Italy, France, Portugal, and Belgium were the main markets. However, in Germany, the structure of the banking sector along regional/state lines was not conducive to engaging with the CCS GF.

The scheme has predominantly directed **support to SMEs from the audiovisual and multimedia sector**, representing over 50% of lending and 44% of loans, but also including

⁸⁷ Cultural and Creative Sectors Guarantee Facility Implementation Update – European investment Fund, Reporting date 31/12/2024

a range of other beneficiaries. Music, performing arts, video games and films were the main sectors benefitting.

It also improved loan conditions as financial intermediaries reported that the CCS GF had a direct impact of a 1 to 2% decrease in interest rates. Also, the guarantee enabled to provision of loans for CCS SMEs with a less robust file, thanks to lower collateral and due diligence requirements. This allowed SMEs to access loans even without having physical collateral, which is important for an industry driven by intellectual property.

The CCS GF also supported financial intermediaries in terms of **skills development and understanding of the CCS markets**, in order to overcome negative perceptions of the sector. According to interviews with the EIF and FIs, the capacity building was particularly valuable for financial intermediaries not familiar with the CCS before applying to the CCS GF. Out of the 21 Financial Intermediaries under the CCS GF, 16 opted in for capacity building and 70% of assessed the capacity building provided as ‘Very Good’.

MediaInvest complements the CCS GF by establishing a **dedicated equity investment platform** dedicated to European audiovisual and gaming projects, producing and distributing films, series and video games. This aims to increase competitiveness by strengthening the financial strength of European players, for example production companies that may invest their own funds in production and thus retain the intellectual property. Its target is to stimulate more private investment by leveraging up to €400 million between 2022-2027. MEDIA supports MediaInvest through blending of funding with the Invest EU and EIF on a 1:1 basis.

MediaInvest has already shown positive results, starting with the investment in Logical Content Ventures, which aims to raise up to EUR 70 million in equity investment for European audiovisual production and distribution companies. The fund has already developed a strong portfolio of investments, including “Emilia Perez”, “Le Comte de Monte-Cristo”, and “Parthenope”. These success stories demonstrate the potential of MediaInvest to drive growth and innovation in the sector.⁸⁸

These financial instruments have been efficiently implemented through a Delegation Agreement between the European Commission and the European Investment Fund. The management fees are in line with the requirements of Financial and Administrative Framework Agreement and legal basis.

The EIF is thus able to mobilise its expertise in financial instruments and investment markets within an EU policy framework with agreed objectives. Coherence with the EU’s investment strategy is ensured through the governance of InvestEU which is coordinated by DG ECFIN and DG GROW.

⁸⁸ As of 25th March 2025, the EIF has signed under MediaInvest the following deals:

- Behold Ventures 0 AB (EUR 20m), Swedish venture capital fund focusing on early-stage companies in the video games sector, signed in December 2024.
- IPR.VC (EUR 25m), Finland-based fund with strong focus on financing European films and TV series, signed in January 2025.
- Logical Content Ventures (EUR 25m); a French alternative investment fund focusing on financing content production across Europe, signed in July 2024. Together S.L.P. (EUR 25m); a pan-European private equity fund with a focus on SMEs and small mid-caps active in the audiovisual sector, signed in December 2024.

4.1.5. Joint assessment of administrative expenses and burden relating to implementation

The cost of administration as a proportion of the total budget for the previous Programme, was well below expected benchmarks and has been further reduced under the current Programme. It went from 7,74% of the grand total budget in 2014 to 6,74% in 2023. The changes in relation to simplification, Multi Annual Financing arrangements, lump sum and cascading grants introduced in CE2 are expected to significantly reduce administrative burden for all parties.

Several measures helped to make the implementation of the Programme more efficient. The introduction of eGrants in CE2 helped to simplify the Programme for beneficiaries through faster electronic applications and streamlined the administration of the Programme implementing a full paper-less process through the use of corporate tools. Relevant training has been provided to the Desks and to final beneficiaries. The average time to grant across the whole Programme is currently 244 days while it was at 300 in its first year of implementation. 97% of grant agreements were signed within the benchmark target of 275 days established by the EU financial regulation.^{89, 90} However, for some actions, such as Culture Moves Europe, the time to grant is approximatively 8 weeks. The simplification of financial capacity verification has contributed to a decrease in the administrative burden for applicants. Financial capacity checks are carried out only on coordinators. Also, applicants that have received over 50% of their annual revenue from public sources over the last two years⁹¹ as well as projects that have requested a grant amount that is not more than EUR 60,000 are exempt from financial capacity checks.⁹²

Although the onboarding to the corporate IT tool eGrants at EACEA streamlined business processes and simplified the access to the Programme for beneficiaries, also resulted in a temporary increase of workload for applicants and beneficiaries, mostly in its first phase due to the novelty of the tool. As highlighted by interviewees consulted for the recent evaluation of EACEA,⁹³ the challenges resulting from the tool complexity affected in particular smaller organisations with lower grants. Key areas for further simplifications have been identified in the framework of such evaluation and are under consideration, namely increasing user-friendliness and better alignment of eGrants to the needs of EACEA's stakeholders for application submission, and project management/reporting. A revision of the applications forms is not possible under the current programming period, due to the limited flexibility of the corporate tool and the need to agree modifications with central services. However, the preparation of the next programming period represents an

⁸⁹European Commission: Directorate-General for Budget, *Financial regulation applicable to the general budget of the Union (recast)*, Publications Office of the European Union, 2024, <https://data.europa.eu/doi/10.2761/686790>

⁹⁰According to Article 197.2 of the Financial Regulation, similarly to other EU programmes managed in the eGrant system, EACEA has 9 months after the call's deadline to sign grants. Such a timeline is transposed into days (275 days).

⁹¹ Current Programme Regulation, Article 13(5), as well as the review of several calls published under the current and predecessor Programmes.

⁹² It needs to be noted that there was also a simplified procedure for financial capacity verification under the predecessor Programme for grants equal or smaller than EUR 60 000 and that a far larger share of projects were able to benefit from this provision under the previous Programme than under the current Programme. A total of 2% of grants awarded under the current Culture strand were equal or smaller than EUR 60 000 compared to 23% under the predecessor Programme, while 11% of grants awarded under the

⁹³ European Commission: Directorate-General for Education, Youth, Sport and Culture, Study supporting the evaluation of CHAFAE, EACEA, EASME, ERCEA, INEA & REA 2017/2018-2021 – Final report – EACEA, Publications Office of the European Union, 2024 (<https://data.europa.eu/doi/10.2766/440417>)

opportunity to take stock of the lessons learnt from the current Programme and to review the application forms in collaboration with EACEA at the end of the programming period. Further scope for increasing user-friendliness is identified in the provision of multilingual resources and services to increase accessibility to the IT tool.

Feedback from beneficiaries suggests the administrative burden has reduced under the current Programme, although this remains high. Almost three quarters (or 73%) of respondents who took part in the previous Programme assessed the administrative burden as high or very high, compared to two thirds (or 66%) under the current Programme. According to the results of the Beneficiary survey, the most common issue faced by 29% of respondents was time-consuming process of application. More detailed data allowing quantification of the administrative time and costs for applicants have not been collected in this evaluation. However, the process of revision of the forms for the upcoming programming period will include the possibility to cater for such data, with the aim of having more solid and precise evidence for analysis in future Programme evaluations.

4.2. How did the EU intervention make a difference and to whom?

4.2.1. MEDIA

The major challenges to the audiovisual sector are transnational in nature (e.g. competition from global tech and media giants, lack of sufficient exports and scale)⁹⁴ and can therefore not be adequately addressed by Member States acting alone. EU national markets are small yet content does not travel well across the single market. Non-national admissions in cinema theatres to EU27 content made up 7.5%, of all admissions in 2014, 7% in 2020 and 6% in 2023.⁹⁵ A similar trend can be observed on VoD, where the views of non-national content went down from 11% in 2020 to 7% in 2024⁹⁶. In comparison, on average US content attracts over 60% of audiences in the EU, with national content in second place. This relatively modest performance is linked to weak discoverability in a context of hyper abundant content, pointing to the need for more effective promotion across Member States. On innovation, among the world's top 2,000 most investing in R&D, there are only 17 media companies and only three of these are EU companies. This is particularly concerning when considering that the biggest tech companies have been making significant forays to the audiovisual and games sectors (along with music and publishing). Also, the levels of uptake by professionals of AI tools and applications remain limited in the audiovisual and news media sectors.

MEDIA funding's EU added value lies in its unique European perspective and strategy. While the cross-border circulation and consumption of European audiovisual content is at the heart of MEDIA funding award criteria, Member State funding is typically concerned with the production and safeguarding of national content, without systematically considering cross-border potential, European competitiveness and culture exposure beyond national borders. For MEDIA, fostering the Single Market as a home base to be competitive within the EU and outside, has been and remains a key goal, as evidenced by the consistent emphasis on improving the transnational circulation and consumption of audiovisual works on the demand side and transnational cooperation among AV players across the value chain on the supply-side.

⁹⁴ European Media Industry Outlook, SWD(2023) 150 final, 17 May 2023

⁹⁵ DG CNECT calculations based on EAO Lumiere database

⁹⁶ European Media Industry Outlook, 2025.

While the exact impact of MEDIA on transnational circulation and audiences of supported work cannot be quantified, MEDIA support is strongly associated with a significantly wider circulation and non-national admissions. MEDIA funding is also associated with an additional 9.5, 6.6 and 3.2 EU non-national countries where a film or series is available across TV, cinema and VoD. It is also associated on average with 125,000 additional non-national admissions per film. Under CE2 the transnational dimension was reinforced even further through greater focus on co-productions/co-development. This related to aspects such as the TV/online scheme, as well as pan-European distribution through Films on the move or VoD networks. This was set in the context of increased competition in the European audiovisual market from global streaming platforms.

MEDIA's focus on improving a level playing field including through collaboration among European countries with different AV capacities is also something that Member State funding alone would not pursue. These efforts serve the purpose of both cultural diversity and competitiveness in Europe. Indeed, the evaluation showed a strong increase in the share of collaborations between low capacity and high-capacity countries in supported works (5% during CE1 to around 30% under CE2) and a substantial share of works in lesser-used languages among supported works. EU funding is also instrumental to ensure that EU audiovisual players can reap the full benefits of Single Market legislation relevant for the AV sector (AVMSD in particular). Fulfilment of the conditions set out in the AVMSD is a requirement for third countries to participate in the programme.

Despite these positive developments, funding remains concentrated among bigger Member States with France accounting for the largest share of funding. More generally, there is a strong correlation between national support and access to MEDIA funding.⁹⁷ As the Creative Europe Programme does not feature pre-allocated envelopes of funding by country and the allocation of funding is the outcome of the qualitative assessment of the applications received, national conditions pertaining to the audiovisual sector have apparently a significant influence over getting access to MEDIA funding. While further measures can be taken at EU funding level to facilitate participation from lower capacity countries, a more meaningful change would require a closer cooperation and alignment with Member States' policies to support the audiovisual sector.

The central role of global digital platforms for the distribution of European games creates the need for a coordinated European approach to support actions to improve the exploitation of these games. These include marketing, promotion and post-release operations, support to skills development as well as innovations in interactive content. Despite growing national support for the video games industry, it remains scattered and lacks a comprehensive strategy. A study by the European Audiovisual Observatory⁹⁸ found that most funding goes to pre-production and production stages, with less for post-release support (which becomes increasingly important) and studio investment. Overall, limited national funding makes Creative Europe support crucial for this sector.

⁹⁷ European Commission: Directorate-General for Communications Networks, Content and Technology, ECORYS and Technopolis, *Study on broadening participation under the Creative Europe media programme – Final report*, Publications Office of the European Union, 2025, <https://data.europa.eu/doi/10.2759/8297102>

⁹⁸ European Audiovisual Observatory, [Legal challenges and market dynamics in the video games sector](#), 2024

4.2.2. Culture

Many challenges that the CCS face are of **a transnational nature** and require a targeted European approach. Evaluation findings highlight the strong EU added value of the Culture strand, which primarily lies in the transnational dimension that has been clearly embedded in its design and implementation. This is also corroborated by the Contribution Analysis, which has found that, overall, there is **strong evidence** supporting the hypothesis that the work of the Culture Sub-programme/strand *directly* contributes to greater opportunities for cross-border collaboration within the European CCS.

Comparing CE1 and CE2, it is noticeable that there is a stronger geographic redistribution of funding within the current Programme in comparison to the previous one as highlighted in the Effectiveness section. The Contribution Analysis network map shows that Germany, Italy, Spain, the United Kingdom, and Belgium appear as key nodes within the network, suggesting that these countries had the highest levels of participation and collaboration. These countries not only collaborate closely with one another, but also with other countries, acting as a key bridge within the network. In CE2, the Contribution Analysis highlights a continuation of the concentration of cross-border collaborations around a set of highly engaged countries, including France (which takes on a more dominant role in the network under CE 2), Germany, Italy and Spain. These countries remain key countries across both networks, showing high connectivity with one another and other countries, again acting as a key bridge within the network. However, due to Brexit, the UK disappears from the analysis. Slovenia, Croatia, and Serbia emerge as more prominent players in CE 2, increasing their connectivity and intermediary roles. The overall volume and structure of cross-border connections remain dense, reinforcing the strength of cross-border collaboration, but CE 2 sees a slightly more distributed network compared to CE1, with additional countries playing intermediary roles. However, some countries such as Armenia, Bosnia and Herzegovina, and Iceland were less integrated across both networks, potentially highlighting ongoing challenges in achieving widespread cross-border collaborations across the network.

As the main objective of the strand is support for European circulation of works and professionals, and cooperation between European professionals and organisations, it helped in developing a pan-EU (and beyond) network that no national programme currently achieves.

European cooperation dimensions are clearly incorporated as core requirements in the design of almost all actions. Around 95% of projects supported under both Creative Europe 1 and 2 involved partners from different countries and, as a consequence, the Programme has been a key driver in stimulating an EU level space for cooperation. For example, the Culture Sub-programme of CE1 helped 4,200 organisations from the CCS to work together in transnational projects to collectively deliver over 7,500 cultural activities including festivals, concerts and exhibitions.

The transnational projects supported by Creative Europe were both large and ambitious, meaning the European added value of the Programme partly lies in its ability to support activities at a scale that a single organisation working in a national setting would be unlikely to achieve.

The stimulation of transnational cooperation amongst the sectors covered by Creative Europe is **not a fundamental goal present in other programmes supporting the sectors**, either at international, national or regional levels. Although schemes supporting the sectors exist, the fundamental objective of these programmes is not to encourage organisations to

work across national boundaries and therefore they do not help the sectors to capture benefits such as an expanded international audience base and new industry contracts from outside of their own country. If Creative Europe did not exist, most of the transnational activity supported by the Programme would have not taken place. For example, it emerges from the Beneficiary Survey that almost all beneficiaries (90%) felt that their project or activities would have been affected in the absence of the transnational support through Creative Europe and when asked to quantify the importance of Creative Europe support, most (77%) attributed at least 50% of project activity to the Programme.

By providing direct funding to operate across borders, the **Culture strand also acted as a complement to other international and national supports**. The majority (85%) of organisations surveyed had not worked in international markets before, with nearly all of these mentioning the costs of producing and showing their works abroad as the main barrier (including the travel of personnel and equipment). Culture strand funding through schemes such as Culture Moves Europe or Perform Europe but also, more generally, the Cooperation projects plug this financial gap with international travel (including residencies) being eligible for financial support in a way that it is not eligible under other international and national schemes supporting the CCS.

These types of schemes make a real difference and are life changing opportunities for many artists when there were no mobility opportunities within national schemes. Evidence shows that 97% of Culture Moves Europe grantees pursue further international mobility. Culture Moves Europe results also show that the scheme can be a springboard for emerging artists' careers with 76% of grantees receiving job offers, new contracts, or new project opportunities stemming from their mobility experience. In addition, the survey of Culture Moves Europe grant beneficiaries showed that 77.9% would not have been able to develop their project without the Culture Moves Europe grant.

Such cross-border cooperation helped organisations in the CCS address a range of common challenges (such as digital innovation and sustainability) and collaborate on topics or activities that would otherwise not be supported through national schemes. In doing so, it accelerates the development curve within the sectors at EU level. Firstly, it helped those supported to become more competitive through internationalising and mobilising their careers and cultural works.

On the Culture Strand side, it is also important to recognise that the culture content being supported by Creative Europe includes **content linked to common challenges and issues facing the EU**. There is less data available to quantify the extent to which the Programme helps the sectors work on common EU values, but the Culture strand has been partly designed to ensure content is relevant to issues such as diversity and inclusion. For example, the Culture Sub-programme of Creative Europe 1 supported 1,106 actions that were focused on the theme of diversity and inclusion and schemes such as Perform Europe specifically funds tours that have a social or environmental dimension. In addition, one in four Culture strand projects had a specific focus on reaching an underrepresented group and 76% of projects were effective in reaching audiences that do not tend to visit, watch or consume culture. Other international and national schemes supporting the cultural and creative sectors do not tend to have a specific requirement or objective linked to supporting cultural content with a clear social goal and do not build this into their design. Culture Moves Europe in its architecture introduced a system of top-ups to allow for greater accessibility and incentivise green travel, which only few schemes offer similar assistance. This again highlights that the Programme adds EU value by not only supporting large

volumes of new cultural content but also content that has a wider set of positive values and messages aimed at groups that do not always consume culture.

There is **moderate evidence** to support that the work of the Culture strand is also key in terms of indirectly contributing to greater opportunities for cross-border collaboration within the European CCS as funded projects continue and extend cross-border activities beyond the duration of the project. Indeed, projects funded under the Culture strand that have a cross-border component (i.e., rely on partnership working across national borders) tend to attract more funding, last longer, and involve more partners. This extended engagement and larger network foster an environment where collaborations can thrive beyond the projects' duration.

Through its focus on funding for international cooperation in various forms, the Programme allows for professionals and organisations from countries with less-established cultural and creative sectors to cooperate with organisations and professionals from European cultural hubs. While results refer to the project leader and to a general funding envelope, a much more diverse range of partners benefitted from the Programme's funding.

The example of Serbian organisations' and professionals' mobility illustrate the value of the Programme in terms of access to international cooperation. For Serbian artists, who do not benefit from access to the EU's open market, participation in the Programme helps counteract isolation and, consequently, potential stagnation. A clear upward trend emerged between 2016 and 2019 regarding Serbian artists' and professionals' participation in Creative Europe mobility initiatives. The number of artists awarded went from around 30 in 2016 to around 180 in 2019 and the number of cultural professionals awarded went from around 20 in 2016 to more than 100 in 2019.

Culture strand's complementarity

The Culture strand also complements other international and national support by providing direct funding to operate across borders. The majority (85%) of organisations surveyed had not worked in international markets before, with nearly all of these citing the costs of producing and showing their works abroad as the main barrier (including the travel of personnel and equipment). Culture strand's funding through schemes such as Culture Moves Europe or Perform Europe but also the Cooperation projects plug this financial gap with finance being eligible for international travel (including residencies) in a way that is not eligible under other international and national schemes supporting the sector.

The Culture strand has also helped countries **to come together to address key social issues**, shining a brighter spotlight on issues such as inequality and artistic freedom in a way that national schemes alone do not tend to do.

The sectors also have a common challenge linked to a **general lack of capacity to grow and take advantage of key opportunities** such as the digital shift. This was tackled through the strand directly supporting capacity building activities with 532 capacity building and training activities taking place over CE1. However, a key way in which capacity was built across the strand was indirectly through organisations learning new skills from their counterparts in other countries involved in their Creative Europe project. This was particularly true when partners in Member States and participating countries where CCS are less mature worked with organisations from countries with more established cultural infrastructure and practices, where the transfer of new learning was particularly high. The development of new skills through participation in Culture strand projects was therefore often indirect and these skills were often learnt by implementing

projects in a collaborative way (rather than just by practitioners specifically receiving training or capacity-building support). When probed to highlight skills and capacity that were gained by working with international rather than national partners, projects again talked about developing new skills to operate at an EU rather than local level to developing their cultural works to non-native audiences.

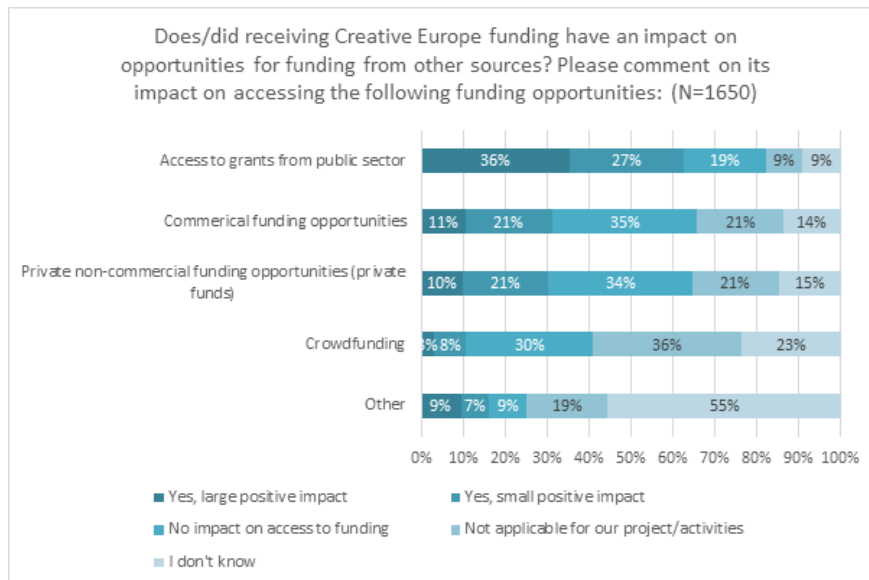
In particular, the impact of participation in Culture Moves Europe on acquiring new skills proves its complementarity with other instruments focusing on skills development. Data obtained through the individual evaluation reports of Culture Moves Europe⁹⁹ shows that almost all the participants **(99.2%) acquired some new skills, knowledge or competences during the mobility**. When asked about the type of skills, knowledge and competences obtained, the most frequent answers concern networking and enhancing positive interactions with people from different backgrounds (79.7%), developing technical/artistic and creative skills directly connected to participants' occupation (76.4%), improving self-empowerment and self-esteem (68.3%) and teamwork/cooperating in a multicultural team (68%). Therefore, a combination of skills and competences connected to internationalisation (networking, interactions, cooperating in multicultural teams), creative skills and individual development arise as the defining contributions made by Culture Moves Europe to most participants in the Programme, which has a life-changing effect on their careers.

However, the extent to which the Programme added value by fostering economies of scale and growth and jobs in the cultural and creative sector^s and creating a leverage effect for additional funds is more mixed.

There is good evidence that the Programme did support leveraging for additional funds, beyond the specific role of the CCS Grant Facility. Cofinancing dimensions remain an important element of support in many cases. In this context, feedback from beneficiaries also suggests that the Programme has generated leverage effects for funding from other sources (see Figure below). These effects were principally associated with access to grants from public sector (63% of respondents). In addition, there is also evidence of leverage effects for commercial funding opportunities (32%), which are most likely to be associated with Media beneficiaries, and other private non-commercial funding opportunities (31%).

Creative Europe's offer in addition to other culture and audiovisual sector support schemes

⁹⁹ Culture Moves Europe – Assessment of the activity reports of the first calls for individual mobility and residency hosts - Report by On the Move.



Creative Europe's offer in addition to other culture and audiovisual sector support schemes

4.2.3. Cross-sectoral strand

News

Support to news media, media pluralism and media literacy is increasingly crucial due to the growing threats to media freedom in the Member States, as evidenced in the EC Rule of Law reports. Few to no Member States are dedicating significant financial resources to supporting the safety of journalists or resilience and innovation in media outlets. Many journalists turn to the EU as the only remedy. Support under Creative Europe also addresses industrial issues faced by all media across Europe, ranging from news deserts to falling revenues. In this context, Creative Europe funding breaks national silos through the identification of good practices and the sharing of business insights and innovations. While the added value of these actions is very promising and has been received positively by the news media stakeholders, the limited value of the intervention has brought an important oversubscription on actions such as media literacy and support to journalism.

Innolabs

The Innovation Lab has enabled collaborations and ideas exchange, among a wide range of cultural and creative stakeholders:

startups, SMEs, independent creators, cultural institutions, and technology pioneers in the sectors, which wouldn't have happened otherwise.

Desks

The Creative Europe Desks have fostered collaborations between European CCS through events and activities focused on creating new collaborations and projects. Thus, the Desks have provided European added value through collaboration between the Desks themselves, but also in creating platforms where European CCS can find partners for future projects and strengthen their existing relationships.

4.2.4. Financial Instruments

The CCS GF has addressed the financing gap which exists across the EU by conducting market research at European level and designing financial solutions which are applicable across Member States. The European Investment Fund was delegated responsibility to design and implement these instruments, drawing on its expertise of European financial markets and players. The *“Ex-ante evaluation of new financial instruments for SMEs, mid-caps and organisations from the cultural and creative sectors”* found that funding gaps and barriers persisted across Europe as regards both loan and equity finance. The calculations indicated that there was a shortfall in debt finance in the range of EUR 2.51 billion – EUR 6.22 billion over three years, or EUR 837 million - EUR 2.07 billion per year. The CCS GF addressed this gap in a significant way, reducing it by 15 to 30%.

Whilst certain Member States, such as France and Italy, had some credit activities through promotional banks, the EIF was able to provide greater scale and scope. It was thus able to harness economies of scale, including favourable financial conditions and sharing best practices and information about the CCS.

The CCS GF thus enabled **diversification of sectors**, lowered interest rates, increased lending without physical collateral and developed understanding of banks about the CCS.

Concerning **MediaInvest**, it adds value by addressing structural weaknesses in the equity investment ecosystem, which is common to countries across the EU, in particular:

1) Underdeveloped financing ecosystem across Europe: private equity investments in the audiovisual sector (including movies, videogames and entertainment) have been on a downward trend. In 2023, the value of private equity deals in this sector was on track to hit its lowest annual level since at least 2019.⁷

2) Capacity Building: MediaInvest includes capacity-building activities for investors and financial intermediaries, increasing their understanding of global audiovisual production and distribution markets.

3) Supporting creative autonomy and scaling-up: The European audiovisual sector is characterized by a large number of creative independent companies which face unequal access to finance. MediaInvest supports these companies, enabling them to grow, compete internationally and harness their creative autonomy.

4.3. Is the intervention still relevant?

4.3.1. MEDIA

The effectiveness of MEDIA outlined in section 4.1 needs to be assessed against the overall macro-level situation in the EU audiovisual sector and beyond. As demonstrated under section 4.1, MEDIA is strongly associated with a wider transnational circulation and consumption of European audiovisual works, has strengthened the competitiveness of supported companies, especially production and improving the level playing field within Europe. However, its core mission of increasing cultural diversity and

the competitiveness of the sector has to be carried out in the face of unprecedented challenges.

On the demand side, EU audiovisual works (including those not supported from MEDIA) are facing tough competition, especially in non-national markets, from US and other countries. For example, in the critical streaming segment (which is driving growth in the industry), EU consumers spend only 7% of their time watching content from other EU countries, while they spend 61% of their time on US works and 20% on works from other non-EU territories (e.g. UK and Asia).¹⁰⁰ Furthermore, EU films and series face tough competition for attention, especially from younger generations, from other media content: in a recent EU-wide consumer survey 45% of respondents between the ages of 18 to 30 indicated that they spend the most time on social media, followed by music and video games. Only 9% indicated films and series as they most preferred type of content.¹⁰¹ On the supply side, the production and distribution environment is also getting tougher. With market consolidation, the surge in investment by streamers into EU content, especially original content, is slowing down.¹⁰²

Another key challenge is to ensure access of European citizens to quality European content, especially to the cinematic experience, which plays a vital role for societal resilience. Screen density varies dramatically across the EU, from 24 screens per million inhabitants in Romania to 102 screens per million inhabitants in Ireland.¹⁰³ There are also big gaps within Member States, with rural or less populated areas often lacking cinemas, thereby creating “*cinema deserts*”. Yet, access to content is crucial to foster a shared European identity. The experience of Europa Cinema confirms the value of the network in addressing underserved communities (e.g. through mobile cinemas in Greece or “*Cinema without barriers*” projections for disabled audiences in Poland) and by enhancing the social experience of going to the cinema through by community building strategies.

The EU AV sector is also lagging behind the US and other regions in innovation, especially in streaming. The share of EU broadcasters in streaming subscriptions is less than 20% and the three main US streaming services (Netflix, Amazon, Disney) alone control 64% of all EU streaming subscriptions.¹⁰⁴ Non-EU players therefore have a strong influence on what kind of EU content Europeans consume, not only in the context of streaming, but in the context of the entire AV sector (to recall, recommendations of streaming services have an above-average impact on consumers’ overall choices regarding films and series, especially among younger generations).¹⁰⁵ On the technology front, the rapid evolution of Generative AI in particular is likely to have a transformative impact. US competitors already leading in online AV content are particularly well-placed to take a lead on this as well, especially tech giants like Amazon, or Google.

¹⁰⁰ SVOD usage in the European Union – report from the European Audiovisual Observatory, 28/03/24

¹⁰¹ European Commission: Directorate-General for Communications Networks, Content and Technology, *Study on audiences, consumer behaviour and preferences relating to the consumption of media content – Final report*, Publications Office of the European Union, 2025, <https://data.europa.eu/doi/10.2759/5502681>

¹⁰² European Media Industry Outlook, 2025

¹⁰³ EAO 2023 Yearbook (data from 2022); UNIC 2023 or 2024 - data provided by UNIC members

¹⁰⁴ European Media Industry Outlook, 2025

¹⁰⁵ ‘European Commission: Directorate-General for Communications Networks, Content and Technology, *Study on audiences, consumer behaviour and preferences relating to the consumption of media content – Final report*, Publications Office of the European Union, 2025, <https://data.europa.eu/doi/10.2759/5502681>

For MEDIA to become more relevant in view of the market and technological trends in the sector, more efforts are needed to strengthen its impact in digital media. In 2023, 61% of works supported for development were developed for cinema, 31% for TV and less than 8% for VoD, while only 5% of market revenues came from cinema, and 75% from TV.¹⁰⁶ More account needs to be taken of market trends, where streaming increased to 16% of market share, cinema fell to 5% and TV remained constant). Distribution support is also mainly aimed at theatrical distribution. Despite positive developments in VoD support as outlined in Section 4.1.2, it has not reached similar audience development impact as the Europa Cinemas network in theatrical distribution.

There is also scope to future proof funding through a stronger focus on young people and their media habits. Supported works primarily focused on adults, with 10% of works supported for development under CE2 meant for children.¹⁰⁷ This can be a missed opportunity for the competitiveness potential of funding for two reasons : 1) European TV animation travels significantly better on VoD than other content, on par with TV animation from other territories, including US ;¹⁰⁸ and 2) Young people are the future demand and there is evidence that they are more loyal to certain content brands/IP than older generations¹⁰⁹. Thus, MEDIA should focus more on developing and exploiting transmedia IP, which is a lucrative business model is deployed by major US studios and streamers and other international players (e.g. Japanese mangas and anime).

To retain its relevance, MEDIA also needs to concentrate on areas where national funding and private investment is more scarce. This means continuing to monitor European added value, taking into account the uneven level playing field between Member States due to different national conditions (of support, market size etc). An enhanced cooperation with member states to explore synergies between EU and national funding and between different funding areas would need to start first with a more systematic monitoring of the relevant support at national level.

On videogames, despite adjustments made to the current support to fit the evolution of the gaming and immersive markets, there is a need to reflect on how best to support this growing segment of the audiovisual industry. The EU remains weak at distribution level, with few operators of marketplaces that sell games, and limited visibility for EU games. Consequently, the EU industry captures a limited share of the revenues of the sector. Furthermore, stakeholders from the video games sector welcomed improvements under the current Programme¹¹⁰ but noted the modest means allocated to development (calls for proposals as largely oversubscribed, and the gap is widening with time). Aspects to be taken into consideration include the use of global digital platforms for distribution of

¹⁰⁶ Support study to the evaluation, based on Programme monitoring data

¹⁰⁷ Data for this indicator was only systematically collected for CE2

¹⁰⁸ *“European animation content circulates very well: when made available on VOD, European animation TV content not only circulates much more than European TV content of all categories, but also as well as animation content from all origin.”* Also, the top 20 exported EU TV seasons list is made up mostly of children animation series. Source: *Animation films and TV series in Europe – Key figures*, a 2021 report by the European Audiovisual Observatory.

¹⁰⁹ European Commission: Directorate-General for Communications Networks, Content and Technology, *Study on audiences, consumer behaviour and preferences relating to the consumption of media content – Final report*, Publications Office of the European Union, 2025, <https://data.europa.eu/doi/10.2759/5502681>

¹¹⁰ Support study for the evaluation

European games, support to marketing, promotion and post-release operations, support to skills development and innovations in interactive content.

Against the backdrop of all these challenges the rationale of continued European action to improve the cultural and competitive situation of European audiovisual content across the EU and beyond cannot be any clearer. The challenge is how to future-proof the Programme in view of the rapid transformative developments in digital media and AI, taking into account also rapidly changing consumption patterns. In particular, the evaluation results show the need to strengthen the relevance of the Programme to help audiences, especially young digital native-people, to discover quality European audiovisual content in the online environment characterised by content hyperabundance. This will require new approaches to promoting content to audiences, including the effective exploitation of digital tools and technologies and effective transmedia exploitation strategies to IP. As the biggest competition for audiences' attention comes from global digital platforms, this requires a European response. This futureproofing will therefore likely require well-coordinated cross-border efforts across the whole EU AV sector, including public and private players, with EU funding to structure and incentivise these efforts in a cost-effective way.

4.3.2. Culture

The Culture strand is framed by the European Agendas for Culture and the EU Work Plans for Culture, which focus on empowering cultural professionals, enhancing cultural participation, promoting environmental benefits through culture, and strengthening the EU's global cultural partnerships. In addition, the Programme is in line with the 2016 Joint Commission/High Representative Communication "Towards an EU strategy for international cultural relations"¹¹¹ and the 2014 Commission Communication "Towards an integrated approach to cultural Heritage for Europe".¹¹² At a broader political level, EU cultural policy making and hence the Creative Europe Programme were designed to comply with the European Commission's political priorities for the 2019-2024 period: *A European Green Deal; A Europe fit for the digital age; An economy that works for people; A stronger Europe in the world; Promoting a European way of life and A new push for democracy.*

Relevance to the cultural and creative sectors

Under CE2, the Culture strand has seen a sharp rise in both the volume and quality of applications, reflecting growing demand and relevance for the cultural and creative sectors, which suggests an increasing interest in support, but is also likely to reflect funding difficulties facing CCS organisations, including national level funding. This gap is particularly acute in the European Cooperation Projects, the strand's largest action, where the action faces massive and increasing oversubscription. It went from receiving 463 submissions in 2021 to 831 in 2023 and due to a stable budget, had its success rate dropping from 27% in 2021 to 17% in 2023. While competition ensures quality, it risks discouraging new applicants if the Programme is seen as too demanding. As things stand, there is four times the demand of available budget by CCS organisations through this call. This is particularly concerning as the trend continued in following years not covered in the evaluation. As a consequence, it was decided from AWP 2024 onwards to open the European Cooperation projects call to large-scale project once every two years, and from AWP 2025 to have a capping of the number of applications an organisation can take part in per year, now limited to three applications.

¹¹¹ <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=JOIN%3A2016%3A29%3AFIN>

¹¹² <https://eur-lex.europa.eu/legal-content/en/ALL/?uri=CELEX%3A52014DC0477>

The specific needs of the CCS have been assessed in several reports, surveys, and statements, and include, among many others, the need to have access to sustainable funding and/or fair pay,¹¹³ to develop tools to tackle the twin transition,¹¹⁴ to establish diverse and gender-equal practices in the sector,^{115 116} to tackle gender equality and inclusion issues and to foster mobility. About 83% of respondents to the Beneficiary Survey endorse the Programme calls' relevance to evolving sectoral trends; 87% appreciate improvements made in the new 2021-2027 cycle compared to the previous 2014-2020 cycle. Furthermore, over 92% of respondents found the conditions of Culture strand's calls to be relevant with the mission of their organisations, and 90% found them to be relevant to the needs of their organisations.

Greening Efforts

Unlike under CE1, ecological concerns -as a cross-cutting priority- are taken into account in the design and implementation of all funded projects under CE2. According to the Programme Performance Statement¹¹⁷ in the 2021-2023 period, EUR 260.8 million have been distributed to actions aligning with the Climate Mainstreaming process (as against EUR 28 million for the entire period of CE1). The figure represents 12% of the total 2021-2027 Programme budget, keeping Creative Europe on track to reach the 30% threshold set for climate-relevant projects.¹¹⁸ In the survey conducted for this evaluation's supporting study, most respondents (54%) state that the strand is relevant in promoting projects that tackle the challenges linked to the green transition. For example, the Sustainable Theatres Alliance for Green Environmental Shift (STAGES – Sustainable Theatre Alliance) project is aiming at accelerating the transition within the theatre sector and fostering a real sustainable development approach in artistic practices, operations and buildings.

Gender Equality and inclusion

In comparison with CE 1, CE 2 places a special emphasis on gender equality and inclusion in terms of stated commitment and funded projects. According to the Programme Performance Statements, over the 2021-2023 period, a total of EUR 61,8 million was allocated to interventions, the principal objective of which was to improve gender equality. At the same time, if also considering interventions with a probable, though indirect,

¹¹³European Commission: Directorate-General for Education, Youth, Sport and Culture, *The status and working conditions of artists and cultural and creative professionals – Report of the OMC (Open Method of Coordination) group of EU Member States' experts*, Publications Office of the European Union, 2023, <https://data.europa.eu/doi/10.2766/46315>.

¹¹⁴European Commission, Culture and Creativity (n.d.). *Creative Europe and the Commission's priorities*. Retrieved on 21st of October 2024 from <https://culture.ec.europa.eu/creative-europe/projects/priorities-2019-2024>.

¹¹⁵European Commission, Culture and Creativity (7 June 2021). *New report recommends how to close gender gaps in the cultural and creative sectors*. Retrieved on 21st of October 2024 from <https://culture.ec.europa.eu/news/new-report-recommends-how-to-close-gender-gaps-in-the-cultural-and-creative-sectors>.

¹¹⁶European Commission: Directorate-General for Education, Youth, Sport and Culture and Menzel, A., *Towards gender equality in the cultural and creative sectors – Report of the OMC (open method of coordination) working group of Member States' experts*, Menzel, A.(editor), Publications Office, 2021, <https://data.europa.eu/doi/10.2766/122208>.

¹¹⁷https://commission.europa.eu/strategy-and-policy/eu-budget/performance-and-reporting/programme-performance-statements/creative-europe-programme-performance_en

¹¹⁸https://commission.europa.eu/strategy-and-policy/eu-budget/performance-and-reporting/horizontal-priorities/green-budgeting/climate-mainstreaming_en

positive impact on gender equality, the overall support rises to EUR 1045,6 million (data includes also MEDIA and Cross-sectoral strands).

The project *She Raps* is a good example illustrating how the Culture Strand focuses on gender equality. This project aimed at increasing the participation and visibility of female rappers on the European rap scene and at developing their professional skills. The ambition was to lead to the structuring of a European ecosystem with professionals and media, facilitate the professionalisation of female rappers, ensure that the place of women in rap was no longer questioned, and ultimately give the public access to increased cultural diversity.

According to the same source, the Culture strand incorporates inclusion and diversity as key priorities, contributing to the objectives of the 2020–2025 Gender Equality Strategy. Particular consideration is given to proposals that outline clear strategies for promoting gender balance and inclusiveness within CCS. The Programme further integrates monitoring mechanisms to evaluate the effectiveness of its gender equality measures. This includes tracking the gender balance in funded projects, assessing the impacts of initiatives on women’s representation and participation, and adjusting funding criteria to address observed disparities.

Mobility

Mobility is supported through all the Culture strand’s actions. Milestones set for the 2021–2027 period, based on historical data from European Cooperation Projects funded in 2017 and available through the 2022 Programme Performance Statement¹¹⁹, show that an expected 170,000 artists and cultural professionals will be mobile beyond national borders thanks to the Programme’s support. It must also be noted that such number is most probably an underestimation as it does not include figures from two key actions, i.e. Platforms and Networks. Furthermore, it is by scaling up i-Portunus, the successful first EU-funded scheme directly targeting individual mobility for artists and cultural professionals, that CE2 launched the Culture Moves Europe action, covering the 40 Creative Europe countries. With a budget of EUR 21 million (2022–2025), an estimated 7,000 grants for individual mobility and residency actions were already made available.¹²⁰

Digitalisation

The Culture strand actively supports the digital transformation in the CCS through targeted actions and funding initiatives that address the evolving needs of artists, organisations, and audiences. According to the Programme Performance Statement, a total of EUR 256,7 million have been awarded to projects sustaining the digital transition (data refers to all strands from 2021 to 2023). Within the European Cooperation projects action, supporting the digital transition of the European CCS is emphasised, being selected as the first or second priority by 15% of all projects funded in the 2021–2023 period. Additionally, Creative Europe Networks aim to assist these sectors in harnessing emerging technologies to drive innovation and improve their competitive edge. Finally, 73% of respondents of the Beneficiary Survey either fully or partially agree with the statement ‘The Culture strand

¹¹⁹https://wayback.archive-it.org/12090/20230331134612/https://commission.europa.eu/strategy-and-policy/eu-budget/performance-and-reporting/programme-performance-overview/creative-europe-programme-performance_en

¹²⁰The data presented originates from Grantees, comprising Artists and Cultural Professionals, who have completed their mobility projects and submitted activity reports. These results are preliminary, based on a 1 159 reports sample, as reports are still being received until June 2025, yet they provide significant insights. These data were provided by the Goethe-Institut staff members during the interviews conducted.

actions under the current Programme are promoting relevant projects to tackle the challenges linked to the digital transition’.

Working Conditions of Artists

The Creative Europe Programme put an emphasis on promoting fair remuneration and inclusion within its funded initiatives. Calls, especially the latest European Cooperation Projects calls, include provisions related to the working conditions of artists and cultural professionals and recognise the precarious nature of artistic work and foresee a priority on “Artists and cultural professionals: empowering the cultural and creative sectors”. One of Perform Europe’s award criteria, “Fairness”, assesses applications based on their commitment to fair practices, equitable payment, and improved working conditions for artists. The Programme prioritises projects that enhance the economic resilience of CCS workers. Such priority is especially important in the ‘Circulation of European Literary Works’ action, a strong commitment to fair remuneration and increased visibility for translators within the European literary ecosystem.

4.3.3. Cross-sectoral strand

News

Support to news media under Creative Europe comes at a turbulent time for the industry. Revenues are sharply declining, with the printed press forecast to decline by 45% from 2019-2028. Advertising revenues, traditionally a lifeline of the media sector, are shifting to global platforms like Google and Meta. Nonetheless, reliance on advertising remains high, and diversification efforts are unevenly distributed across the fragmented EU industry, with smaller companies unable to pivot to digital models. Employment in the news media sector has declined by 30%, with a net loss of over 225,000 jobs between 2008 and 2019, primarily affecting traditional print media. Yet journalists are now expected to possess diverse skills, including digital content creation, data analysis, and multimedia storytelling. Meanwhile, citizens are progressively shifting digital means of news consumption and relying more and more on social media platforms.

Support to news media thus started in 2021, under Creative Europe 2, aiming at strengthening both the sector's economic resilience and democratic role. This seed support focused on three areas of action, given the budgetary limitations under the cross-sectoral strand.

Firstly, **the Programme mapped risks and threats to media pluralism across the Union through a Media Pluralism Monitor.** This annual report has consistently identified medium or high risks to pluralism in most EU countries, driven by factors such as political interference, economic pressures, and the concentration of ownership. On average, only 43% of EU citizens believe their media is free from political and commercial pressures. Another action, the Media Ownership Monitoring System, enhances transparency around media ownership structures.

Secondly, Creative Europe has contributed to address some of the industrial weaknesses of the European news media sector, notably through media collaborations. The strand also strengthens democracy and societal resilience by supporting local and regional journalism, investigative reporting, and public interest news. These initiatives are particularly relevant in underserved regions i.e. “media deserts”. The

focus on media freedom is exemplified by the Media Freedom Rapid Response Mechanism, which provides legal support and safety for threatened journalists.

Finally, a media literacy action intends to empower citizens to navigate digital media. Media users are exposed to a growing number of media sources, formats and mediums, and concerted efforts are needed to make sure they are able to engage and interact effectively with content.

Thus, Creative Europe has addressed key emerging needs of the information market. However, the actions were constrained by limited budgets, and challenges at EU level have kept increasing. The political guidelines 2024-2029 acknowledge “a deep change in the information space, shifting from editorial media sources to user-generated content mediated by platforms and pushed by algorithms”. The guidelines also commit to “support for independent media and journalists”.¹²¹ The extent to which this will require an adaptation and increase of the Union financing response remains to be determined.

Besides the limited budget, the actions to be funded are prescribed in the legal base of Creative Europe in an exclusive and binding list. Actions directly funding the fight against disinformation are not on this list and instead have so far been funded under the Digital Europe Programme. Under the budget principle of specificity, an action which has been financed under a specific EU programme should not be financed under another programme. Also, a revision of the legal basis of Creative Europe would be very challenging to negotiate at this point. Instead, the approach taken, as foreseen in the legal basis, has been to support quality content and media viability and media freedom and media literacy through a number of innovative actions. In the future, ensuring more flexibility in the legal base would help respond to emerging challenges.

Innolabs

The evaluation confirmed the potential of collaboration among different cultural and creative sectors and the need to address the common challenges they face, which is more pronounced for a number of specific copyright-intensive industries. The implementation of the Creative Innovation labs- an action fostering cross-overs across all cultural and creative sectors- has shown that synergies are more pronounced between media and other copyright-intensive media sectors (music and publishing) as they face common challenges/opportunities for competitiveness and digital transformation as well as the increased control of large extra-EU platforms over what content people in Europe and beyond consume. They also face similar challenges on the creation and consumption side due to AI. Such collaboration will be increasingly relevant in future because of the acceleration of the digital transformation, including the deployment of AI. The needs are expected to be significant as only 30% of surveyed CCS companies have adopted a digital transformation strategy and companies have indicated that investment in AI represents less than 1% of their total investments.¹²²

The potential of coherent transmedia IP strategies among copyright-intensive sectors can be better exploited in the Programme. Consumer and other research indicate that the exploitation of the same IP across different content formats (films/series, books, games, music) has a positive impact on competitiveness. Young people especially seem to be loyal

¹²¹ “Europe’s choice”: Political guidelines for the next European Commission 2024-2029, Strasbourg, 18/07/2024

¹²² Monitoring the twin transition of industrial ecosystems CULTURAL AND CREATIVE INDUSTRIES Analytical report,

to IP¹²³. Indeed, large US studios and streamers have built lucrative franchises around different IPs¹²⁴. Transmedia exploitation helps with discoverability and increases commercial success for both the original and adapted version. For example, according to one research project, the box office revenues of a film adapting pre-existing content (books) is around 50% higher than films with an original screenplay, while TV dramas adapted from books attract 58% more viewers¹²⁵. It also works the other way round: for example, one book sold 82% of all its copies in the year after it was adapted into a TV drama despite being in circulation for 25 years before its adaptation.¹²⁶

Creative Europe Desks

The **Creative Europe desks** support the implementation of the Programme as well as sharing of results and learning from the Programme with national stakeholders, as well as opportunities for learning between Desks. As noted in the Effectiveness section, the role of Desks is well established, following on from the previous Programme, and plays an important role in the operation of Creative Europe. In addition to a clearly defined role in relation to supporting beneficiaries, they also play an important role in contributing to the specific objective of promoting cross-sectoral transnational policy cooperation, through the dissemination of results and learning.

Creative Europe is a popular Programme, with more than 29,600 applications submitted in CE1 and already 6 169 in CE2 between 2021-2023¹²⁷, most of these from micro and small companies with limited resources. Access to information and gaining a better understanding of the application processes for Creative Europe funding, remains a crucial need for these companies.

The Creative Europe desks' main missions make a relevant contribution to this need in terms of promotion of the Programme and dissemination of information on calls for proposals, results and training opportunities, as well as advice to applicants. Relevant actions of the Creative Europe desks also include events and training to the CCS locally and nationally, as well as peer-learning and knowledge-sharing across the desks, especially to provide adequate guidance to applicants on new actions (e.g. Creative Innovation Labs) or priorities of the Programme.

4.3.4. Financial Instruments

Overall financial instruments play a key role in providing alternative sources of financing in a context where European audiovisual content, especially films, tends to be dependent on public financing. At the same time European films tend to be under financed compared to their US competitors which have much easier access to finance. On average public

¹²³ In a recent EU27 consumer survey on media consumption habits commissioned by DG CNECT, the fact that a film or a series was part of a franchise or new season of an existing series was rated by young people to be among the top three factors that attract them to films and series (along with genre and the story), well above the average importance of other factors. European Commission: Directorate-General for Communications Networks, Content and Technology, *Study on audiences, consumer behaviour and preferences relating to the consumption of media content – Final report*, Publications Office of the European Union, 2025, <https://data.europa.eu/doi/10.2759/5502681>

¹²⁴ <https://www.ampereanalysis.com/report/franchises-ip-still-key-to-success>

¹²⁵ See the following study focusing on the UK market: 'The book was better!' – How literary adaptations contribute to the wider creative industries | Frontier Economics

¹²⁶ Ibid

¹²⁷ Programme monitoring data

funding contributes 26% of film financing¹²⁸ and this limits the potential for more ambitious films with the capacity to attract wide international audiences. For example, the average annual budget of MEDIA of EUR 200 million is less than the production budget of a single film from the “Mission Impossible” franchise.

The Creative and Cultural Sectors Guarantee Facility remains relevant and whilst it partially closed the gap in lending for the CCS, the financing needs remain significant. MediaInvest also remains highly relevant for the audiovisual sector. It was launched under the impetus of the Media and Audiovisual Action Plan¹²⁹ which found that there was a gap in equity financing for audiovisual, as well as other creative sectors, estimated at 399-648 million euros per year. Whilst MediaInvest is expected to make a significant contribution, the gap in financing is expected to remain significant in future.

Moreover, the powerful leverage effect makes financial instruments a valuable complement to grant funding. While the grant element allows for co-financing the starting costs of a project, the latter facilitates the investment into works and companies at scale. This model applies across content formats, from films to series and video games. Therefore, continued blended financing of a dedicated equity investment platform will be very relevant going forward.

5. WHAT ARE THE CONCLUSIONS AND LESSONS LEARNED?

5.1. Conclusions

Creative Europe is the EU funding Programme supporting the cultural, creative and media sectors, with the objective of enhancing competitiveness and promoting cultural and linguistic diversity and heritage. Cultural, creative and media sectors represent a significant industrial ecosystem and face common challenges stemming among others from market fragmentation, digital transformation and intense global competition. At the same time, Creative Europe operates within the Treaty on the Functioning of the European Union, where culture is a supporting competence whilst the EU has a single market policy on media. The budget of Creative Europe is relatively modest, equivalent to 0,2% of the 2021-2027 MFF.

However, Creative Europe targets activities where the EU intervention can bring additional value compared to action of Member States alone. In particular, it addresses the fragmentation of the cultural, creative and media sectors along national and linguistic borders. Moreover, national-level funding alone is insufficient to support the overall competitiveness and diversity of EU media, audiovisual and other cultural and creative sectors. In particular, Creative Europe supports transnational cooperation and circulation of content across the EU, through pan-European activities such as collaborations, co-productions and networks, thus leveraging the value of national assets. This approach also strengthens EU citizens’ equal access to media and cultural content. Thus overall, the role of Creative Europe has been to make a meaningful contribution whilst fully respecting subsidiarity.

¹²⁸ EAO (2021). Fiction Film Financing in Europe: A sample analysis of films.

¹²⁹ COM(2020) 784 final

The 2018 mid-term evaluation of CE 1 found that the Programme contributed to the general objective of supporting cultural diversity by increasing access of audiences to a diversity of European works and to the objective of competitiveness by helping CCS operators scale up at the European level. This ex-post evaluation of Creative Europe 2014-20 corroborates these findings through additional evidence on impacts.

Having three distinct strands means that the Culture, MEDIA and Cross-sectoral strands operate as three largely distinct but complementary elements. Across these three strands, the common key dimension of funding is the promotion of cross-border, pan-European activities in different forms (collaborations, co-productions, networks etc.). The strand approach is clearly founded on the distinctiveness of the sectors each strand aims to support, recognising that their needs and opportunities are different. At the same time the three distinct strands clearly correspond to the overarching general objectives of the two Programmes. The challenges facing the CCS, including media, as articulated in the Regulations, are generally well translated throughout the design of the Programme and strand objectives and appear to be aligned with European policy agendas and programmes.

In its first iteration (2014 to 2020), the Programme had a budget of EUR 1.47 billion, which was expanded to EUR 2.5 billion in its second iteration (2021 to 2027), representing a 66% increase. This has allowed for greater reach and impact within the CCS. Notwithstanding this increase, the budget implementation of CE2 has been effective and on target despite challenging circumstances, ranging from Brexit to the Covid-19 pandemic.

Creative Europe is co-managed by DG EAC and DG CNECT and its implementation, mainly delegated to the Education and Culture Executive Agency. Administrative costs have increased less than the operational budget, indicating efficiency savings between 2014 and 2023.

The CCS GF made a major contribution to the competitiveness of Europe's cultural and creative sectors. It was the first guarantee facility dedicated to these sectors at European level. Through effective collaboration between the Commission and the EIF a strong market response was cultivated in sectors previously perceived as high risk. Over EUR 1.8 billion in loans was leveraged, which exceeded by far the initial goal of EUR 600 million and made a significant contribution to improving access to finance for CCS SMEs. The CCS GF was subsequently incorporated into InvestEU as of 2021.

A key issue for Creative Europe is that there are low levels of funding compared to the challenges at stake. Creative Europe alone cannot solve systemic issues, but budget limitations affect the effectiveness in meeting the objectives set. There is already a high level of over-subscription across the three strands, with success rates as low as 26% in Culture, 16% in MEDIA and 8% in the Cross-sectoral. However, if the full potential of Europe's unique CCS is to be realised then additional strategic interventions will be needed. The focus will also need to be sharpened on today's challenges, for example the platformisation brought about by giant global competitors, the shift of audiences online, the surge of AI and the increasing threat to artistic and media freedom. Furthermore, in order to have greater impact, a Team Europe approach will be needed, through concerted action with Member States, which remain by far the most important sources of funding for these sectors, while acknowledging that there are great differences among Member States' spending.

At the same time the synergies between the Culture and MEDIA Strands could be better exploited, notably among copyright intensive industries, which are the CCS most heavily

affected by the competition from the US platforms, changed consumption patterns and the AI revolution. Synergies with other EU programmes, including Cohesion funds and research and innovation programmes should also be strengthened to address the scale and the multi-dimensional nature of the challenges.

5.1.1. MEDIA

Over three decades the MEDIA brand has become an organic part of the European audiovisual ecosystem and is associated with a significantly wider transnational circulation of works. It is widely known, respected and coveted across the sector. During this time, the core mission of MEDIA has remained clear: to bring quality European films and series to people across Europe. The evaluation revealed that on average MEDIA supported EU films and series are associated with a significantly wider circulation than non-supported films: on average this means 9.4, 6.6 and 3.2 more EU countries across TV, cinema and VoD respectively, than an unsupported EU film or series during the evaluation period. While the results are not significantly different for cinema and VoD for CE1 and CE2, the difference is more significant for TV (10.6 CE1 and 3.3 CE2), though the significant additional circulation is also present under CE2. This difference may be due to methodological issues and full impacts will need to be checked for the final evaluation. MEDIA support was also associated with 125,419 more non-national cinema admissions relative to unsupported films. CE1 shows a stronger impact (additional 134k admissions) than CE2 (97k). Extrapolating this to all supported films under CE1, MEDIA is associated with at least 241 million additional admissions. The sample under the current Programme is not large enough to make a reliable extrapolation at this point in time.

On the other hand, the significantly higher availability of supported works in non-national VoD catalogues do not seem to have translated into significantly higher views. On the contrary, the average views for supported works on VoD catalogues in the sample was 376,346 for works supported during CE1 and 496,676 for CE2 (405 361 for both Programmes combined). This compares to significantly more non-national views for comparable unsupported works, which average 1,301,953 views for the CE1 and 1,551,724 for the CE2 period (1,400,631 across the combined period). All in all, despite some methodological issues, these findings showcase a significant challenge for MEDIA funding to attract audiences online (in the absence of sufficiently granular data for films and series shown on TV, the impact of MEDIA funding on non-national TV audiences could not be estimated).

MEDIA support to films also achieved considerable international cultural impact as demonstrated by the significant level of recognition of supported films at international festivals and awards across both CE1 and CE2.

MEDIA has delivered also on its other key performance indicators. It has supported training audiovisual professionals, with 80% of participants declaring a strengthened professional capacity and 50% women participants. Co-productions have increased to 84% of MEDIA supported works under CE2 (from 36% under CE1) and remained considerably higher than the industry average across both Programmes (estimated at 12%). The number of audiovisual works produced in lesser used languages has increased and the number of professionals reached by business-to-business activities is on track.

Moreover, MEDIA has responded to the digital shift by consistently encouraging innovation. Innovative tools and business models have been funded, in particular

harnessing artificial intelligence. Video games and virtual reality experiences have been developed. The network of cinemas uses digital tools to reach wider audiences.

The innovative MediaInvest equity platform has been co-funded by InvestEU and MEDIA under CE2 is on track to achieve the target of leveraging EUR 400 million in investment, as set out in the Media and Audiovisual Action Plan. It has attracted a healthy market response, with the four deals already signed. Allocated funds have been fully absorbed and additional budget resources could allow further high leveraging of private investments, helping the industry compete with global players who often have easier access to private capital. Continued blended financing of a dedicated equity investment platform will be very relevant going forward

Efficiency has improved consistently across the two Programmes. Administrative costs have been reduced especially by consolidating delivery of support into bigger grants, thus reducing the number of contracts and payments to be processed. The number of grants processed fell by 46% despite the budget envelope increasing by over 65%. However, the number of applications has steadily increased, requiring extra processing and evaluation. Therefore, further streamlining of MEDIA actions is needed combined with a shift towards closer monitoring of project results and impacts. Further simplification of the application process for beneficiaries, which are typically micro and small companies, has also been highlighted as key.

MEDIA funding's EU added value lies in its unique European perspective and strategy, which aims to strengthen a European industry which is more than the sum of its national parts. Projects under both Programmes systematically address cross-border potential as key to competitiveness and diversity. By scaling up and achieving economies of scale, MEDIA projects develop a Single Market in media content and services, as a home base to be competitive within the EU and beyond.

Moreover, MEDIA addresses the uneven capacity of the audiovisual industry across Member States through strengthened “level playing field” measures which boost the participation of companies from lower capacity countries, further favouring cultural diversity. The participation of LCC countries rose to 22% over 2021-22 and there has been increased collaboration between low and higher capacity countries between the two Programmes. Further efforts will be needed to ensure broader participation and to avoid the dominance of beneficiaries from a few countries only. Efforts are also needed to foster a fairer access to the cinematic experience across and within the EU Member States, which provide a unique social experience of shared storytelling.

MEDIA is fully in line with the objectives of the Audiovisual Media Services Directive which provides the regulatory framework for a single market and promotion of European works. Indeed, alignment with the AVMSD is a requirement for third country participation.

Market and technological developments have also re-enforced the rationale of MEDIA funding as the major challenges are transnational in nature, such as lack of exports and audiences shifting online. The traditional focus has been on films and theatrical distribution but the new trends in consumer preferences which are driving the media need to be better integrated, including video-on-demand and video games. Moving forward, futureproofing of MEDIA funding to better cope with these challenges is necessary as well as safeguarding the role of the audiovisual industry in fostering cultural diversity and societal resilience.

While MEDIA demonstrated the flexibility to react to unforeseen challenges, the rigid legal basis, which establishes an exclusive list of actions to be implemented, has

restricted the capacity to respond adequately to emerging challenges. These include the market disruptions caused by COVID-19 pandemic, accelerating digital transformation e.g. generative AI and Russia's war of aggression against Ukraine.

5.1.2. Culture

The design and implementation of the Culture Sub-programme in **Creative Europe 1** appeared to be well aligned with its general and specific objectives. Through substantial investments in cross-border collaboration, mobility, capacity-building, and audience engagement, the Sub-programme strengthened the international presence and competitiveness of cultural professionals and organisations, especially small and micro entities. By facilitating over 1,200 transnational projects creating in turn over 7,500 cultural activities and supporting more than 22,000 professionals in their international careers, it fostered lasting partnerships and encouraged cultural diversity and inclusion. The objectives set in terms of key-performance indicators were, where possible to monitor, reached by the Programme. As highlighted by the Contribution Analysis, there is strong evidence that the Culture sub-Programme contributed to greater opportunities for cross-border collaboration by funding projects built upon cross-border partnerships, therefore contributing to the creation of a European cultural ecosystem.

The Sub-Programme intervened **in a number of different areas of the value chain**, including creation, development and design, through to production, distribution and circulation. It helped stakeholders from different countries come together to address key societal issues, such as inequality, discrimination or artistic freedom in a way that national schemes alone do not tend to do.

Building on the successes of CE1, **the Culture strand of CE2 has wider ambitions than its predecessor in that it has a stronger focus on sustainability and on promoting societal resilience and enhancing social inclusion.** It has been assessed to be effective, efficient and internally and externally coherent throughout the evaluation process and it is possible to notice that there is an evolution within the strand toward larger and potentially more complex cultural networks through the actions of the Programme. Through the cross-border collaboration it entices, the strand has a clearly defined EU added-value, which is further reinforced in its current version. Finally, the strand is found to be coherent within EU policy, as well as when answering the needs of the different EU CCS, as seen with the positive reception met by the actions of the Programme.

All targets set by the key-Performance indicators collected by the 2021-2027 Programme are on track to be reached by the end of the MFF, except the one for the number of people reached by the activities supported by the Programme which should be revised.

The Culture strand has allocated EUR 50.7 million to projects prioritising **social inclusion**, with 81% of CE2 projects indicating a positive impact in this area. While outcomes are not yet fully measurable, the strand clearly targets social inclusion and intercultural dialogue by embedding EU values such as equality and sustainability into funded content. It also aims to broaden access to culture beyond traditional audiences. Future audience data will be key to assessing its long-term impact on societal resilience and inclusion.

The Culture strand continues to support the **mobility** of artists as a core feature, although the captured data is still currently incomplete, in particular with the development of the first European mobility scheme for artists Culture Moves Europe. This aspect is

instrumental in boosting both emerging and established careers, according to those supported.

The strand is also helping CCS organisations in reaching new audiences, particularly beyond national borders, and early results from actions such as Culture Moves Europe scheme sees benefits for individuals' careers leading to increased competitiveness in the CCS.

The use of sector specific calls in the Culture strand enables a more targeted approach to specific topics but may increase the potential for duplication of results. The Culture strand has seen a greater degree of evolution in the design of calls and priority topics, which adds to its level of coherence. Horizontal and sector-specific actions appear to provide a flexible framework that enabled the strand to engage with the broad diversity of CCS organisations. However, due to the limited budget of the Culture strand, it has not been able to cover all the main different sectors and, more importantly, to devise robust tailored-made strategic actions that would really complement the horizontal approach.

The degree to which the size of the Culture strand's budget was appropriate in supporting the cultural and creative sectors improved under CE2 due to an increased budget. This substantial increase in the budget under the Culture strand allowed the Programme to provide larger grant allocations to each successful applicant. In the meantime, the increasing grant sizes and higher co-financing rates led to an improvement in accessibility to the Programme as measured by the number of unique organisations supported. Data suggests that there was a significant increase in the number of unique organisations supported by the strand.

In more general terms, both the Culture sub-programme of CE1 and the Culture strand of CE2 aimed to contribute to the Union's global strategy for international relations. Around 300 direct grants to stakeholders in non-EU countries have been provided under both Programmes. In total, within the two programming periods, direct support to 15 countries outside of the EU has been given (representing around 13-18% of the total number of grants provided by the Culture strand). Although it is too early to measure the impact of this work on strengthening international relations the strand is making progress towards supporting the cultural dimension to international cooperation.

5.1.3. Cross-sectoral strand

The Creative Innovation Lab has provided seed funding for collaboration between audiovisual and other cultural and creative sectors. After initial difficulties in attracting relevant proposals, it has gradually provided added value by funding multidisciplinary projects which address common challenges, notably reaching wider audiences and monetisation, through harnessing digital applications such as artificial intelligence and block chain. Further synergies with other EU funding sources, such as the European Innovation Council or Cohesion funds could scale up these innovative projects and strengthen their sustainability.

Support to news media has been introduced into the second Creative Europe in response to the growing political priority of strengthening democracy and the rule of law across the European Union. The news media industry is facing turbulent times with revenues and employment sharply declining and threats to media freedom increasing. High quality projects have been selected to address key structural and technological changes faced and

to promote an independent and pluralistic media environment as well as media literacy. These new projects are proving effective, notably by targeting areas most at risk.

However, these initial efforts and resources need to be significantly scaled up. The latest Media Pluralism Monitor shows varying levels of risks to the independence and pluralism of news media sectors in different Member States. The situation for news services specifically in less populated, peripheral areas is increasingly problematic, creating so-called ‘news deserts’ across the EU. Few Member States are dedicating significant financial resources to supporting the safety of journalists or resilience and innovation in media outlets. Media has become critically important in a period marked by geopolitical tensions, the rise of extremism and disinformation. Many journalists turn to the EU as the only remedy and stakeholders have called for a “Marshall Plan for journalism”, with the twin objective of supporting media freedom pluralism and the resilience of the sector.

The main tasks of the Creative Europe Desks are to provide information about the Programme, assist the applicants, stimulate cross-border cooperation and support the Commission in managing the Programme. Considering the number of schemes available under Creative Europe for the European CCS, and that these CCS are mainly very small enterprises with limited resources, the assistance of the national Desks is crucial for the success of the Programme. In addition, the possibility to contact the national desk reduces significantly the need for guidance to applicants by the EACEA or the Commission.

Desks appear as a trusted source of information, and most applicants use the Desks as their primary source. According to the Beneficiary Survey, the quality of information from Creative Europe Desks was generally considered good or very good by 79% of the respondents

While the strand demonstrated the flexibility to react to unforeseen challenges, the rigid legal basis, which establishes an exclusive list of actions to be implemented, has restricted the capacity to respond to emerging challenges. These include the market disruptions caused by COVID-19 pandemic, accelerating digital transformation e.g. generative AI and Russia’s war of aggression against Ukraine.

5.2. Lessons learned

5.2.1. MEDIA

MEDIA has a proven impact on the audiovisual industry in the EU as it is instrumental in enabling the industry to operate beyond national borders and reach wider audiences, as highlighted by the Programme indicators. Bringing films, series, documentaries and other works to audiences across Europe is a powerful way of sharing European stories which reflect our diversity and values. It also promotes business models (e.g. international co-productions) and the use of innovation, which help companies become more competitive. The share of international co-productions among supported works is a useful metric to assess competitiveness, as they generally provide greater access to audiences and finance in across more countries and offer opportunities for operational efficiencies. However further efforts are needed to make content available across borders on all distribution platforms, including for communities in areas lacking cinema infrastructure.

Overall MEDIA has helped to shape a European ecosystem and complements the audiovisual policies of Member States which have a domestic focus. MEDIA support therefore needs to be accompanied by collaboration and dialogue with Member States and the whole audiovisual industry in order to better exploit synergies.

MEDIA has evolved successfully over CE 1 and CE 2, with a sharpened focus on innovation and cross-border collaboration, including co-productions and pan-European distribution. While in some areas (e.g. co-productions) the positive impact of changes under the current Programme is already clearly measurable, for some other key actions (e.g. support directly to innovative tools or 360 support for B2B markets), more time is needed for these impacts to fully materialise. This adaptability is a key success factor for MEDIA as it responds to market trends driving the audiovisual industry as well as lessons learned about how funding can add most value. As media markets are global, innovative and dynamic it will be important to continue monitoring trends in order to ensure steer MEDIA so that it keeps pace with developments. However, the flexibility of MEDIA has been limited by the legal base which specified an exclusive list of actions to be funded. In particular, the further integration within MEDIA of online video on demand services, to which audiences have shifted, needs to be further considered. Also, the significant differences between countries' participation in MEDIA needs to be further addressed.

The combination of grant funding and financial instruments has served the industry well by catering for different needs, from access to seed funding and co-financing to bridging loans and equity for ambitious pan-European ventures. The blended support to MediaInvest should thus continue and the Desks can play a valuable role in informing stakeholders about the ongoing opportunities, including with the CCS GF.

IP intensive content industries share common challenges, in particular in attracting wider audiences in the digital age and responding to consumer preferences, with special focus on digital native young people. The success of and experience with MEDIA in reaching wider cross-border audiences through co-productions and pan-European distribution is very relevant in this regard.

The evaluation showed that going beyond the official monitoring indicators offers relevant additional insights in the impact of the Programme. Third party data in particular allows for not only a monitoring of outputs but also benchmarking. The latter helps identify impacts and areas to improve. For example, the detailed title-by-title Lumiere databases of the European Audiovisual Observatory enabled a counterfactual analysis, which could not have otherwise been carried out. Such external data also allowed other benchmarking, e.g. the share of co-productions against the wider market. Given MEDIA's focus on transnational aspects of activities in the audiovisual sector, the best metric to assess the impact on competitiveness is to look at the market share of supported works among non-national views (exports) in relation to comparable other (non-supported) European works on the one hand, but also in relation to US and other third-country works. These can complement existing indicators on competitiveness, in particular the share of international co-productions among supported works.

However, the evaluation exercise revealed a number of data gaps. The EAO does not have a complete database, similar to Lumiere cinema (supported under the Policy actions of MEDIA), which provides an overview of all titles viewed on a large sample of broadcasting services across the EU and only provides aggregate data on this. Third party commercial data exists, as audience measurement for TV is well established, but

procurement would entail a substantial cost. The VoD viewing data would also benefit from covering additional countries and catalogues, as the small sample was the reason why some models could not be run. However, VoD viewing measurement is still an evolving market, which places limitations on the data that could be acquired. An important question is how to combine audience measurement for linear TV and VoD, seeing as traditional broadcasters now also offer different VoD services. Moreover, data on some important aspects, in particular genre and budget, are not consistently available in third party film and series databases. Genre is the most important feature of a film and series, which attracts people to the film and series, across both younger and older generations, based on successive consumer surveys commissioned by DG CNECT on media consumption habits. Budget (both production and marketing) is a potentially relevant aspect on the supply-side, which the current evaluation (counterfactual analysis) was unable to capture due to data limitations. We also do not have access to data on the promotional activities on streamer's websites, a key source to discover content for both younger and older generations as confirmed by the above surveys. Finally, data on the consumption of other types of online content competing for people (especially young people's) attention, like social media, games, music etc would be important to assess the competitive positioning of EU films and series.

The usefulness of additional data has to be assessed against the cost of obtaining it on the Commission and/or beneficiaries. For the final evaluation, efforts are needed to find additional external data to fill in the gap regarding key variables, TV consumption and production and marketing budgets in particular. As regards administrative costs, the beneficiary survey in the final evaluation should contain more specific questions on this. As regards training data, additional data needs to be collected on the purpose of the trainings in order to assess their relevance. Monitoring the number of active users of supported innovation projects would likely require collecting data from beneficiaries after the project ended. The following table provides examples of potentially useful indicators for the final evaluation and indicates where this would mean additional efforts/costs. The feasibility of additional indicators therefore needs to be studied carefully ahead of the final evaluation of CE2.

Indicator	Covered by present evaluation?	Data availability
Number of non national MEDIA countries where a supported work is available overall, also separately for 1) cinemas, 2) on TV and 3) streaming;	Yes	Currently available from the EAO (Lumiere, Lumiere VoD, TV). Requires matching project data with external databases, currently common ID is not readily available in a significant share of supported works.
Non-national views of supported works in MEDIA countries overall, also separately for 1) cinemas, 2) on TV and 3) streaming; and for films/series	Yes for cinema, partially for VoD, not for TV	Currently available for cinema, and, to a limited extent, for streaming (from EAO), but limited data for genre distinction and budgets even within these databases. TV data would need to be sourced additionally. Requires matching project data with external databases, currently common ID is not readily available in a significant share of supported works.
Number and share of coproductions among supported works	Yes	Project monitoring data - for benchmarking third party database is needed, currently available from EAO
Number and share of supported coproductions 1) involving low-capacity countries, and 2) led by low capacity countries	Yes for 1), no for 2)	Project monitoring data - for benchmarking third party database is needed, currently available from EAO (however, needs to be studied if data is sufficient for 2))
Number and share of supported coproductions among 1) countries with different language groups; and 2) non-neighbouring countries	No	Project monitoring data - for benchmarking third party database is needed, currently available from EAO
Number of nominations and awards at top-tier festivals and awards globally (to be defined)	Yes	Publicly available information, but no central database. A Horizon Europe supported project (Crescine) announced a database which may cover this, but tbc (release planned for later in 2025).
Number and share of supported works for development which is released within 4 years after being given support	Yes	Beneficiaries are not required to report on whether the film/series supported for development is eventually released. This creates the need for matching against external databases, e.g. EAO (Lumiere, Lumiere VoD, TV), which is time-consuming.
Average time it takes for development supported works to be released separately for 1) cinemas, 2) on TV and 3) streaming;	Yes	Ibid
Number and share of supported projects involving IP exploitation in at least two different formats	No	Project monitoring data - however, would need automatization (currently would require read-through of applications)
Number and share of projects based on pre-existing IP and within that pre-existed IP previously supported by MEDIA	No	Ibid
Share of public funding in the finance of supported works	No	Project monitoring data, automatization improvements probably needed
Share of third party equity finance in the finance of supported works	No	ibid - Also, it would be difficult to find third party data for benchmarking
Number of active users or licences of supported innovation at 3 and 5 years after project completion	No	Project monitoring data - but could require beneficiaries to report after the project is finished.
Number and share (screenings, audience) of non-national works from MEDIA countries shown at supported festivals	No	Project monitoring data, some further automatization and/or reporting requirements may be needed
Number and share (screening, audience) of non-national works from low-capacity MEDIA countries shown at supported festivals	Yes, for number	Project monitoring data
Average number of MEDIA countries from which films are screened in supported festivals + separately, average number of countries with lesser used languages	No	Project monitoring data, some further automatization and/or reporting requirements may be needed
Number and share (screenings and admissions) of non-national works from MEDIA countries shown in supported cinemas	Yes	Project monitoring data, some further automatization and/or reporting requirements may be needed
Number and share (screening and admissions) of non-national works from low-capacity MEDIA countries shown in supported cinemas	No	Project monitoring data, some further automatization and/or reporting requirements may be needed
Average number of MEDIA countries from which films are screened in supported cinemas + separately, average number of countries with lesser used languages	Partially	Project monitoring data, some further automatization and/or reporting requirements may be needed

As regards project monitoring, there is room for improvement. The final reports of beneficiaries do not always lend themselves to aggregating and analysing data, due to format (pdfs) and lack of granularity e.g. in budgets. Reporting requirements may be refined to address these aspects whilst taking into account the need to avoid over-burdening beneficiaries which are typically micro and small enterprises.

Finally, it can be explored how gains in administrative efficiency could be further enhanced. The feasibility of an increased use of multi-annual financing, cascading grants and lump sum payments could therefore be explored. The experience with these simplifications can be further assessed for the final evaluation and more granularly followed up with beneficiaries in the survey accompanying the final evaluation (including compiling data on specific administrative costs).

5.2.2. Culture

The Culture strand **is working and performing well**, effectively engaging with a high number of cultural and creative organisations. It offers rich opportunities to work transnationally, collaborate across borders, strengthen organisational capacity, and successfully connect with new international audiences. Despite such significant achievements, the Culture strand faces oversubscription issues, with high demand and limited funding. The evaluation of the Programme shows **that the strand is effective, efficient, relevant with strong EU added value, while entailing low administrative costs.**

The international opening of the Culture strand, going beyond the EU, is an essential element for promoting EU values, intercultural dialogue and raising awareness of EU democratic values. It has also facilitated peer learning on key issues for culture and heritage. The projects supported by the strand create an environment that is beneficial for peace, security and sustainable growth within the EU and beyond. This dimension becomes even more relevant in the prospect of an enlarged Union, where culture has a key role to play in bringing people together, enabling dialogue, mutual understanding and cooperation based on common values.

The strand's main actions (European Cooperation Projects, Networks and Platforms), which represent the bulk of its budget, have been kept mainly unchanged between the 2014-2020 and 2021-2027 iterations of the Programme. This has facilitated a continued exposure to similar types of interventions over time, **fostering stronger results and impacts, in particular in terms of cross-border collaboration, mobility, capacity building and circulation.** This horizontal approach has been refined with the formulation of clear priorities in the Cooperation Projects' calls published on a yearly basis under CE2, corresponding to the strand's priorities as well as the Programme's cross-cutting issues (in particular, inclusion, gender equality or contribution to the fight against climate change) as specified in the corresponding regulation.

Both the Culture Sub-programme of CE1 and the Culture strand of CE2 have been instrumental in helping the CCS address key issues identified in the regulation, such as the fragmentation of the market along national and linguistic lines or the challenges connected with the dual transition, but with the obvious limitations resulting from a limited budget as highlighted in the evaluation. However, some needs have become more acute in recent years while new pressing ones have emerged, in particular the need to preserve artistic freedom, recognise the intrinsic value of culture as well as its contribution to society, promote solidarity, inclusiveness and intergenerational fairness, the need to help CCS navigate the digital transition and the surge of AI, the need to take into account the new international geopolitical landscape, and to give a response to the political priority of improving working conditions in CCS. To help address these issues, the Commission is working on a proposal for a Culture Compass for Europe, a strategic framework to guide the multiple dimensions of culture. This is a major policy initiative, giving culture a more central role within the EU's policy framework for years to come.

The dual (horizontal and sectorial) approach introduced in the Culture strand of CE2 is successful and both approaches are complementary. The sectorial approach has been instrumental in tackling specific challenges of some sectors, notably the music, books and architecture sectors, while the horizontal approach (with its horizontal priorities) offers more agility and leeway for cultural and creative operators to cooperate, experiment and

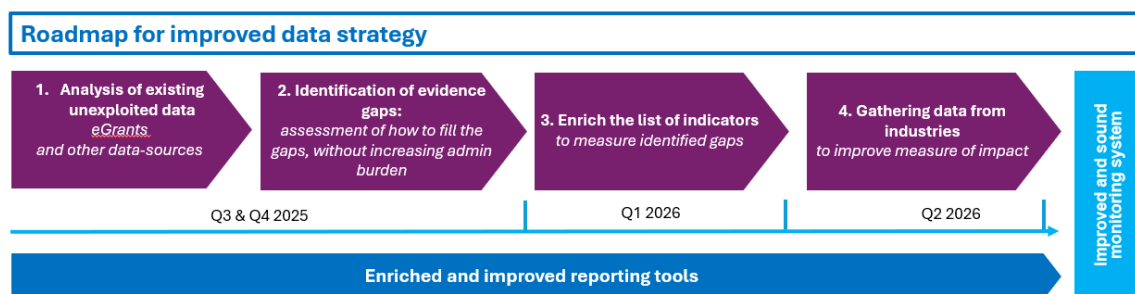
develop bottom-up solutions to common challenges. It is advised to keep a similar approach in the next programming period, while the approach may need reinforcement to make the strand more policy focused.

The evaluation has identified that the **demand for funding is up to four times greater than the available budget for the Cooperation projects action**. This action represents the cornerstone of the strand, covering 60% of its budget. Currently, many high-quality proposals do not get funding due to oversubscription. Furthermore, despite recognised progress made in making the Programme **more accessible and inclusive**, for example through increased co-funding rates, the addition of a third medium-scale category in the Cooperation project's action, and reduced financial checks, barriers continue to hamper the participation of potential beneficiaries. There is a need for the Commission to have a regular review and close monitoring of the simplification measures introduced in the current Programme. In addition, the Culture strand should maintain its focus on addressing **accessibility** challenges and continue to expand its reach to cultural and creative organisations that have no prior experience working at EU level. Indeed, as mentioned in section 4.1.6, several simplification and burden reduction measures have been introduced between CE1 and CE2. However, the Commission is exploring options to further improve the Programme's efficiency and accessibility. For instance, regarding the Culture Strand, the Commission is now considering moving all actions still managed with actual costs to a lump sum system, which has proven to be more efficient. Some burden reduction measures could also be introduced in CE2's successor Programme, such as a simplified application form.

It is also clear that further efforts are needed to **increase the visibility** of the opportunities the Culture strand offers and the impact it produces. Outreach could be further improved by sharing and better targeting information about the Programme to reach out to new organisations in different sectors and countries that are not sufficiently engaged with the Programme. The process of **disseminating and exploiting project results** could be improved to ensure that these are further shared and promoted and thereby more effective uptake and long-term impact.

Several lessons have emerged as well regarding the **regular monitoring, evaluation and data availability**. While improvements of the monitoring framework were made in both programming periods, and the diminution and streamlining of the different key performance indicators between CE1 and CE2 benefitted the current Programme by offering a large monitoring of many crucial areas of intervention of the Culture strand, some indicators remain difficult to measure, in particular concerning the results (outreach) and impacts of the Culture strand. The Commission will undertake concrete measures to develop a more systematic approach to Programme data collection. These include a thorough analysis of data currently available (including for actions managed outside eGrants), aiming at making better use of the existing data, without increasing beneficiaries' burden. This will allow for a clearer identification of the evidence gaps, especially concerning the results of the different actions supported by the strand, to be complemented through adjustments or ad-hoc data collection. In parallel, efforts and additional resources are put on further developing EAC Qlik sense reporting tools, while enriching them with data gathered from data sources other than eGrants. More complete reporting tools will facilitate the overview and analysis of Programme outputs and results across actions and sectors. Additionally, discussions with the industries (mostly music and book sectors) are ongoing to assess how better industry data can be shared and used to analyse the impact of the relevant initiatives of the Programme on them. These steps will allow for the

development of a better and more complete monitoring system both when it comes to outputs, and results of the Programme. Future evaluations will also benefit from this improved monitoring system, when long-term impacts are to be analysed.



5.2.3 Cross-Sectoral strand

On news media, for which support was introduced 2021, the evaluation confirms that the results of the cross sectoral strand of Creative Europe are very promising. This seed funding to news media has focused on three areas of action, given budgetary limitations. Firstly, the Programme has helped monitor and map media pluralism and ownership across the Union. Secondly, media collaborations have contributed to addressing some of the industrial challenges. Funding also strengthens democracy and societal resilience by supporting local and regional journalism, investigative reporting, and public interest news, in particular in “media deserts”. Finally, media literacy actions have helped citizens to navigate digital media in the context of growing disinformation.

Thus, Creative Europe has addressed key emerging needs of the information market. However, the actions were constrained by limited budgets, and challenges at EU level have kept increasing on areas such as media freedom, media viability and disinformation, negatively impacting societal resilience and democratic participation. The political guidelines 2024-2029 acknowledge “a deep change in the information space, shifting from editorial media sources to user-generated content mediated by platforms and pushed by algorithms”. The guidelines also commit to “support for independent media and journalists”. The extent to which this will require an adaptation and increase of the Union financing response remains to be determined.

The evaluation also confirmed the potential of collaboration among different cultural and creative sectors and the need to address the common challenges they face, which is more pronounced for a number of specific copyright-intensive industries. The implementation of the Creative Innovation labs- an action fostering cross-overs across all cultural and creative sectors- has shown that synergies are more pronounced between media and other copyright-intensive media sectors (music and publishing) as they face common challenges/opportunities for competitiveness and digital transformation and due to the increased control of large extra-EU platforms over what content people in Europe and beyond consume.

Under CE2, an indicator was added measuring the number of events organised by the Desks. As demonstrated by the table in the Effectiveness chapter the 2027 target has almost been reached by 2023, thus the Desks have been overperforming vis-à-vis the expected target. This should lead to a closer analysis of the different events and activities carried out with a view to refining the indicator and adjusting the target for 2027.

ANNEX I: PROCEDURAL INFORMATION

The Creative Europe 2014-2020 final and 2021-2027 interim evaluation (Decide reference: PLAN/2023/95) has been steered by the Directorate-General for Education, Youth, Sport and Culture (DG EAC), with Directorate-General for Communications Networks, Content and Technology as co-responsible for the evaluation. The evaluation was carried out under the scrutiny of an Interservice group (ISG) comprising of representatives of 5 other DGs (SG, LS, BUDG, RTD and JRC). The ISG met for the first time in the context of the evaluation on 03 March 2023¹³⁰.

The ISG was involved repeatedly at key stages of the evaluation and the group convened at several stages of the evaluation on the following dates

- 03 March 2023
- 4 May 2023
- 22 February 2024
- 28 January 2025

The ISG has been consulted as well (in writing) on the documents produced by the contractor. The ISG met last on 9 April 2025 to discuss the SWD before its submission to the Regulatory Scrutiny Board.

No exception from the usual procedural requirements of the better regulation guidelines was requested for this evaluation.

This evaluation is based on evidence gathered via different channels and an overview is presented in Annexes II, III and IV

The main sources of evidence are internal analyses by the European Commission, the report presented by the evaluator contracted in the framework of this evaluation carried out between 2023 and 2025.

¹³⁰ Ares(2025)2617862

The evaluation has been presented to the Regulatory Scrutiny Board of the European Commission on 14 May 2025 and received a positive opinion with reservations. The comments expressed by the Regulatory Scrutiny Board and the manner they have been taken into account in the Staff Working Document is detailed below.

RSB comments	Changes in the SWD
The complex intervention logic should be thoroughly revised and broken down for the purpose of the evaluations, clearly distinguishing the evaluation periods between Creative Europe 1 and 2, in order to allow for a substantive evaluation in line with the Better Regulation toolbox. Needs (the rationale for the intervention) should be better specified based on existing evidence.	General: The intervention logic has been accordingly broken down in order to better showcase the initial needs and rationale of the intervention (Section 2.1).
If competitiveness is an objective for the intervention it needs to be clearly analysed as such. The definition and operationalisation of ‘competitiveness’ needs to be clearly specified and correspond to mainstream understandings of the meaning of competitiveness, and also that it is not duplicative with other objectives for the intervention.	Culture strand: When relevant, we reflected the impact of the Culture Strand on competitiveness (notably in section 4.1.3 “Culture: effectiveness”). MEDIA Strand: The Competitiveness section under 4.1.2 which analysed competitiveness-related impacts based on specific objectives in the legal base, including monitoring indicators in the legal base related to competitiveness was complemented with an analysis of traditional competitiveness metrics like market share for the bigger picture.
The points of comparison for the Creative Europe 1 and 2 Programmes (the respective baselines) should be clarified for each of the three strands, allowing for a meaningful assessment of the progress towards achieving the objectives, outputs, outcomes and impacts in line with the intervention logic. It should be clear how the existing indicators relate to the elements of the intervention logic. In addition, the causal links should be clearly spelled out to allow for their assessment. Rather than merely referring to qualitative and quantitative evidence limitations as well as to indicators of limited value, the report should analyse why these limitations persist(ed) despite the Commission’s mandate to amend indicators in the respective Articles 20 in both the Creative Europe 1 and the Creative Europe 2 Regulations. It should elaborate how indicators should be amended for the remainder of Creative Europe 2 in order to allow for a proper analysis of the Programme’s achievements in the final evaluation and indicate potential solutions for the	Culture strand: The sub chapter ‘Points of comparison’ in the SWD has been revised for the Culture strand, bearing in mind the comments and request by the RSB to link the set of existing indicators with the Intervention Logic of the Programme (Section 2.2 “Points of comparison”). Moreover, the “lessons learned” section has been amended to clarify what will be done in concrete terms to improve the indicators and the monitoring and evaluation framework (Section 5.2.2 “Lessons Learned: Culture”). MEDIA Strand, Cross-sectoral strand and Financial Instruments: A new para was added for the overall approach under section 2.2 and these questions were then addressed in more detail under Sections 4.1.2, 4.1.4 and 4.1.5. Finally, this question is addressed under ‘Lessons learned’ (5.2.1) summarising main data gaps and proposing possible indicators for the final evaluation while also indicating what it would take to gather data for these indicators from beneficiaries or elsewhere (and hence a need to carefully study the feasibility going forward).

RSB comments	Changes in the SWD
elements that are difficult to measure, in particular concerning the outreach of the culture strand.	
The potential to further simplify and reduce administrative burden, in particular on applicants/beneficiaries, should be better considered.	General: The SWD now includes a specific section on this (4.1.6). how efficiency gains have been made (Section 4.1.6) The SWD's lessons learned section now also evokes possible measures to further simplify administrative burden (Section 5.2.1 "Lessons learned: MEDIA" and 5.2.2 "Lessons Learned: Culture").
The analysis of effectiveness should be more specific and thorough, beyond qualitative input from beneficiaries based on indicators, and include quantitative evidence reflecting outputs, outcomes, impacts and objectives, separating the two programming periods. The assessment needs to go beyond numbers of supported beneficiaries and their perceptions. Where evidence gaps are identified the data needs together with specification of relevant methods should be reflected in the analysis of indicators and lessons learned providing a clear roadmap how the deficiencies could be addressed.	Culture strand: Regarding the Culture strand, all relevant and available quantitative data is reflected in the SWD. Moreover, regarding the indicators issue, the "lessons learned" section has been amended to clarify what will be done in concrete terms to improve the indicators and the monitoring and evaluation framework (Section 5.2.2 "Lessons Learned: Culture"). MEDIA strand: The MEDIA analysis already relied on mostly quantitative evidence, including a large amount of third-party data, and hardly used any reference to beneficiary surveys. The evidence was nevertheless clarified in view of RSB comments (e.g. correlation vs causality under the counterfactual) and restructured for a closer alignment with objectives (section 4.1.2). Some additional benchmarks were added (e.g. for cinema networks) in section 4.1.2. Data gaps and how to address them are clarified. Finally, this question is addressed under 'Lessons learned' (5.2.1) summarising main data gaps and proposing possible indicators for the final evaluation while also indicating what it would take to gather data for these indicators from beneficiaries or elsewhere (and hence a need to carefully study the feasibility going forward). The cross-sectoral assessment already had extensive quantitative evidence for the CCs GF for CE1. While the news and Innolab actions are two new for significant quantitative evidence for a meaningful analysis of impacts, some ideas for future indicators are now provided under section 4.1.4.
The administrative costs to all stakeholders should be accounted for in detail in Annex IV and feed into an assessment of efficiency in the main body of the	All strands: The supporting study by the external evaluator did not collect quantitative data from beneficiaries on the administrative time or costs associated

RSB comments	Changes in the SWD
report, including non-quantifiable benefits as part of a cost-benefit analysis in line with the Better Regulation standards.	with participating in the Programme, apart from their own opinions (self-reported) about the level of costs. However, the following key admin costs have been identified for beneficiaries and are reflected in Annex IV: • Length of the application and grant process • Grant management reporting • Financial capacity checks • Budget and payment justifications Such data will be collected afterwards in ad hoc surveys, especially as part of the final evaluation of CE2. This is now clarified in section 4.1.6 and ‘Lessons Learned’. However, the current analysis of efficiency and progress made has been conducted in light of available data.
The analysis of efficiency should be revised. In particular, given the methodological limitations, it should be clarified that correlations rather than causality can be established between the supported audiovisual works and the impacts which in turn does not allow to causally attribute the observed impacts (such as generated additional revenue) to EU financing. Annex IV, EU added-value section and conclusions should be revised accordingly.	<u>Culture Strand:</u> The analysis of efficiency takes into account limitations and establishes correlations rather than causality (Section 4.1.3 “Culture: efficiency”). <u>MEDIA strand:</u> Sections 4.1.2, 4.2 and the conclusions as well as Annex IV were all redrafted in accordance with this comment.
The use of the “success rate” (defined as the percentage of successful applicants) should be clarified.	<u>Culture Strand:</u> The part on success rate for the Culture strand has been significantly reduced and moved to the Relevance part. (Section 4.3.2, “Relevance: Culture”). This was primarily an issue for the assessment of the Culture strand - success rates did not have such a prominence in the assessment of other strands.
The report should analyse why in both the Media and the Culture strands there are a few Member States benefitting disproportionately from the Programme, what this means for reaching the objectives of the Programme related to promoting linguistic diversity, and how this can be addressed for the remainder of the current Programme.	<u>Culture Strand:</u> Additional information added on the fact that the Culture Strand allows for organisations from countries with less-established Cultural and Creative Sectors to cooperate with and benefit from organisations from European cultural hubs (Section 4.1.3 “Culture: effectiveness”). The SWD now also includes more information on the evolution of the geographic distribution on funds (Section 4.2.2 “EU added value: Culture”). <u>MEDIA strand:</u> Section 4.1.2 now has a greater prominence with a dedicated subsection to this topic (‘Level playing field, geographic and linguistic diversity’) This

RSB comments	Changes in the SWD
	has explanations on the reasons for this and expanded on further efforts that may be needed, incorporating the results and recommendations of a recent study on this topic. The EU value added section has also been amended accordingly. Finally, specific indicators on this topic have been mentioned for the future and assessed in the ‘Lessons learned’ section, in addition to the indicators already used.
The relevance analysis should be significantly improved taking into account evidence on needs based on identified funding gaps and current and emerging challenges including their relative importance in terms of the impacts. In particular, indirect impacts should be spelled out; for example, when it comes to disinformation, the report should refer to actions that indirectly address this issue. In this regard, external coherence with other EU interventions like Horizon or Digital Europe should be better analysed. Based on the above analysis, the relevance assessment should draw conclusions on the relevance of the Programme and its current funding distribution, including share of grants and financial instruments. On EU added value the related assessment should be strengthened with additional analysis focusing on quantitative evidence beyond the qualitative input from beneficiaries.	<u>Culture Strand:</u> The relevance section now includes CE2-funded projects illustrating how the Programme participates in tackling certain issues such as Greening and Gender Equality and Inclusion (Section 4.3.2, “Relevance: Culture”). <u>MEDIA Strand:</u> Section 4.3.1 now identifies more specifically (and with quantitative evidence) the areas where more focus is needed, including e.g. digital media and young people. Section 4.3.3 addresses the point on disinformation. In Section 4.3.4 a forward-looking assessment of the role of financial instruments in audiovisual funding specifically had previously been provided. The EU added value section for MEDIA already contained significant quantitative data. Nevertheless, we added some further data and the findings from a targeted study commissioned by DG CNECT on the level playing field in the audiovisual industry. As for the cross-sectoral strand, data was added about funding gaps for CCS GF.
Conclusions should provide a clear view of the achievements of the final evaluation for Creative Europe 1, and an analysis on whether progress towards the objectives is on track for the interim evaluation of Creative Europe 2. In particular, conclusions on developing cultural and linguistic diversity and competitiveness of the supported sectors should be drawn based on available evidence. Lessons learned need to reflect on the need to improve monitoring and evaluation arrangements and data needs to allow for the final causal evaluation of impacts.	<u>Culture strand:</u> The conclusions and lessons-learned section has been modified in light of these comments. (Section 5.1.2, “Conclusions: Culture”, and Section 5.2.2, “Lessons learned: Culture”) <u>MEDIA strand:</u> The Conclusions now provide all the headline figures of the analysis separately for CE1 and CE2 where available (CE2 is not always available due to time delays of impacts and data availability). The conclusions on the main objectives rely on the evidence presented before and recall headline findings from the analysis). ‘Lessons learned’ (5.2.1) was significantly extended and now summarises the main data gaps and proposing possible indicators for the final evaluation while also indicating what it would take to gather data for these indicators from beneficiaries or elsewhere (and hence a need to carefully study the feasibility going forward).

ANNEX II. METHODOLOGY AND ANALYTICAL MODELS USED

The final evaluation of Creative Europe 2014-2020 (CE1) and the interim evaluation of Creative Europe 2021-2027 was coordinated by the Creative Europe Programme EAC.D2 unit, in cooperation with the Audiovisual industry and media support programmes unit (CNECT I3), the unit Evidence-Based Policy and Evaluation, of the Commission's Directorate-General Education, Youth, Sport and Culture (DG EAC), with the support of: (i) the Executive Agency EACEA (Units B1 and B2); (ii) and an interservice group comprising 5 Commission DGs and jointly chaired by DG EAC and DG CNECT. The evaluation process started in 2023 and was guided by the Terms of Reference drawn up for contracting the external evaluator, consulted with the ISG and approved by EAC board of directors.

The Staff Working Document draws upon extensive quantitative and qualitative evidence gathered through a variety of data collection activities undertaken by the external contractor, and a thorough evaluation analysis, applying the methodologies described below. The data was tested and triangulated against the main evaluation criteria in accordance with the approaches outlined in the better regulation toolbox 2023 chapter 6, and the framework established by the Creative Europe Programme regulations.

The methodology used to evaluate the Creative Europe Programme showed several strengths, including a clear intervention logic framework and a mixed-method approach that combines quantitative elements (Programme data, Eurostat data, survey data, counterfactual analysis, contribution analysis) with qualitative elements (e.g. interviews, literature review and desk research). These methods provided a comprehensive analysis and valuable insights. While the evaluation made use of large, detailed external datasets, some gaps in the data available remain (see 'Lessons learned' section). Additionally, there was potential for missing perspectives in interviews, and the possibility of bias in self-reported data from participants when it comes to surveys conducted for the evaluation. A major limitation in the analysis of Programme data for CE2 consisted in the lack of critical mass of completed projects by the end of 2023, which was the evaluation cut-off date. This stems from the long duration of the supported projects, many of which were extended due to the impact of the COVID-19 pandemic.

Despite these potential limitations, the methodology has provided a solid foundation for assessing the Programme.

The study of the external evaluator was conducted using a mixed-method approach, delivered in five Work Packages (WPs):

WP1	Scoping interviews	10 scoping interviews were held to refine the approach and priorities for the evaluations and understanding of the Programme alongside an initial review of key Programme documentation. The
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		results of scoping activities informed the subsequent design of data collection packages and research tools.
WP2	Desk research	Literature review: focused on relevant Programme documentation (including work programmes, funding call documentation, and details of funded projects), EU policy documents, industry and sector reports, and other external evaluations. A total of 25 EU programmes, 47 annual work plans, 105 pieces of literature were reviewed in addition to web based information. Quantitative desk research: the quantitative analysis collated monitoring data provided by EACEA on details of applicants and contracted projects, grant processes, and key monitoring indicators. Broader contextual datasets, including key sector trends were collected from the main European datasets, as well as through the review of literature. Further statistical analysis was conducted as part of WP3.
WP3	Counterfactual analysis (MEDIA) and contribution analysis (Culture)	The counterfactual analysis assessed the impact of the MEDIA strand support to the creation and distribution of audiovisual works on the transnational circulation and audiences of supported works when compared to works not supported by the Programme. This analysis incorporated available data into its analysis, mainly sources from the European Audiovisual Observatory (EAO), IMDb, Programme data. This exercise was the first of its kind to be conducted, offering a statistical analysis of the impact of the MEDIA strand. The contribution analysis (CA) used a mixture of quantitative and qualitative data to explore whether, how and why interventions such as the Culture strand of CE contributed to impact, and how various contexts may have influenced those impacts. The CA aimed to understand the likelihood that the Culture strand has contributed to greater opportunities for cross-border collaboration among entities within the European CCS. The Creative Europe logic models were used to define three contribution hypotheses related to cross-border collaboration that could subsequently be tested using CA.
WP4	Consultation activities <i>(more details available in Annex V)</i>	The consultation activities gathered the views of a broad and representative range of stakeholders and beneficiaries of Creative Europe. Consultation activities included:

		<u>Call for Evidence</u>: 21 responses received <u>Stakeholder interviews</u>: the research team conducted 94% (62 out of 64) of all interviews agreed with DG EAC and DG CNECT, due to lack of responsiveness by the remaining stakeholders. Stakeholders in the following countries were consulted: Austria, Belgium, Czechia, Denmark, France, Germany, Greece, Hungary, Ireland, Italy, Lithuania, the Netherlands, Norway, Poland, Portugal, Slovenia, Spain, Sweden, and the United Kingdom (leaving the EU in 2020). <u>Beneficiary survey</u>: 2 504 responses received from beneficiaries <u>Creative Europe CCS Guarantee Facility survey</u>: 113 responses received <u>Open Public Consultation</u>: 233 responses received
WP5	Case studies	9 Case Studies categorised into two typologies: <u>National Case Studies</u>: undertaken in 6 countries (Italy, France, Serbia, Norway, Lithuania and Poland) <u>Action Case Studies</u>: collecting additional data and insight on the operation of selected actions, namely Culture Moves Europe, European Cooperation Projects (Culture strand), Support for Film Distribution (MEDIA strand) Across both categories of case studies, the research concentrated on the complementarity of Creative Europe funding with alternative financial sources. This included examining how the funding supported specific cultural and creative activities (e.g., mobility) or business growth (e.g., distribution projects). The central research question explored the added value of Creative Europe funding in fostering the internationalisation of cultural and creative work and businesses.

In addition to the support study, the evaluation used publicly available data sources, such as data extracted from Programme Performance Statements¹³¹, Creative Europe Monitoring Reports, the European Media Industry Outlook 2025, Studies and consumer surveys commissioned by DG CNECT, Studies published by EACEA, Eurostat, reports published by relevant cultural and creative organisations (e.g., On the Move); non-publicly available data, namely Programme monitoring data available in internal EAC/EACEA dashboards; and market data on media markets from third party sources, like the European Audiovisual Observatory for example.

ANNEX III. EVALUATION MATRIX AND, WHERE RELEVANT, DETAILS ON ANSWERS TO THE EVALUATION QUESTIONS (BY CRITERION)

MEDIA strand

Evaluation questions	Judgement criteria and indicators of success	Data collection methods	Section of the Staff Working Document
What was the impact of MEDIA funding on the transnational circulation and consumption of audiovisual content?	Main indicators: • Share of tickets sold for non-national films in the EU which are directly attributable to MEDIA support. • Additional admissions/audiences added by MEDIA support and additional revenues. • Average additional number of countries that MEDIA-supported works circulate in. • Formal KPI under CE2 on number of people accessing supported works from another participating	• Counterfactual analysis based on 1) external databases (European Audiovisual Observatory, Internet Movie Database) on audiovisual films and series supported under MEDIA; 2) Programme monitoring data • Market data on media markets from third parties, e.g. European Audiovisual Observatory (especially for market context and benchmarking) • Programme Performance Statements (formal KPIs)	4.1.1 Effectiveness subheading + Annex VI

¹³¹ https://commission.europa.eu/strategy-and-policy/eu-budget/performance-and-reporting/programme-performance-statements/creative-europe-programme-performance_en

	country – 40% achieved in first 2 years • Several KPIs under CE1, most discontinued after MTR of 2018 (see Annex VII)		
What was the impact of MEDIA on the competitiveness of the EU AV sector, in particular the main types of beneficiaries, independent producers and distributors?	Main indicators: • Share of works supported for development which get released • Average time works supported for development get released • Number of coproductions: Formal KPI under CE2 on track to be met as regards number of coproductions and exceeded already for budget of coproductions. • Share of coproductions of supported works vs unsupported works • Share of distributors funded under CE1 (before Covid) which increased their position in the market of non-national films under CE2 (post-Covid). • Share of beneficiaries reporting positive impact on their competitiveness • Number of participants in learning programmes who improved their competences and employability	• Counterfactual analysis based on 1) external databases (European Audiovisual Observatory, Internet Movie Database) on audiovisual films and series supported under MEDIA; 2) Programme monitoring data • Market data on media markets from third parties (especially for market context and benchmarking) • Programme monitoring data • Programme Performance Statements (formal KPIs) • Beneficiary survey	4.1.1 Effectiveness subheading + Annex VII

	(official KPI: CE2 target on track to be met) • Number of people reached by B2B activities at major markets (official KPI: CE2 target may not be met due to Covid disruption)		
What was the impact of MEDIA on cultural and linguistic diversity and level-playing field across participating countries?	Main indicators • Official KPI: recognition of supported works at prestigious awards/festivals (data provided in the assessment) • Share of tickets sold in the EU to non-national European films by supported cinemas. • Collaborations between low capacity and high-capacity countries (official KPI, no target, target is only given for overall coproductions) • Number of supported works in lesser used languages (CE2 target of 2845 is on track to be met)	• Programme monitoring data • Counterfactual analysis based on 1) external databases (European Audiovisual Observatory, Internet Movie Database) on audiovisual films and series supported under MEDIA; 2) Programme monitoring data • Programme Performance Statements (formal KPIs)	4.1.1 Effectiveness subheading + Annex VII
How efficiently have the actions under the MEDIA strand been implemented under CE1 and CE2?	Main indicators • Average cost of a supported film vs Average revenue from cinema admissions attributable directly to MEDIA (1:4)	• Counterfactual analysis based on 1) external databases (European Audiovisual Observatory, Internet Movie Database) on audiovisual films and series supported under	• 4.1.1 Efficiency subheading + Annex IV

	• Administration costs increased less than the operational budget for CE 2 and are below the 7% benchmark. • Thanks to streamlining of support schemes, the number of grants processed fell by 46% despite the budget envelope increasing by over 65%.	MEDIA; 2) Programme monitoring data • Programme monitoring and administrative data	
How coherent is the MEDIA strand, internally, with other strands in the Programme, with other EU policy instruments, including regulatory and funding and with national funding?	• Objectives, type of support and structure of MEDIA strand • Objectives, type of support provided under national funding • Level/divergence of support across different Member States • Objectives, type of support, type of funding and management and structure of other types of EU support. • Objectives and implementation of regulatory instruments related to the sector, including alignment of third countries. • Feedback from MEDIA beneficiaries on other types of support	• Legal base, work programmes, calls of MEDIA and other EU funding instruments • Regulation (AVMSD) • Study commissioned by DG CNECT on the level playing field among MEDIA countries • Case studies on national funding in the supporting study for the evaluation • Beneficiary survey carried out for the support study for the evaluation	4.2.1, Coherence subheading
What was the added value of the MEDIA strand as compared to funding provided at the national and regional level?	• Key transnational market trends • Share of tickets sold for non-national films in the EU which are directly attributable to MEDIA support.	• European Media Industry Outlook (SWD, 2025)	4.2.1

	• Additional non-national admissions/audiences added by MEDIA support and additional revenues. • Average additional number of countries that MEDIA-supported works circulate in	• Objectives of MEDIA vs national support • Counterfactual analysis based on 1) external databases (European Audiovisual Observatory, Internet Movie Database) on audiovisual films and series supported under MEDIA; 2) Programme monitoring data • Study on video games funding by the European Audiovisual Observatory	
Is the intervention still relevant in view of market and technological developments?	• Share of European vs US and other content on VoD • Preferred type of media of young people • Differences in screen density across Member States • Main market trends in content commissions • Share of US companies in streaming • Impact of streaming recommendations on content choices • Main trends in video games markets	• Market reports of the European Audiovisual Observatory • Consumer survey on media consumption habits commissioned by DG CNECT covering EU27 (forthcoming) • European Media Industry Outlook 2025 • Desk research • Support study for the evaluation	4.3.1

CULTURE strand

Effectiveness

Evaluation questions	Judgement criteria and indicators of success	Data collection methods	Section of the Staff Working Document
<u>To what extent have the Culture strand of both Programmes (both Creative Europe 2021-27 and Creative Europe 2014-2020) delivered the expected outputs, results and impacts? What negative and positive factors seem to be influencing outputs, results and impacts? Have there been any unintended effects?</u>	• The Programme is on track with the different indicators and targets it set. • The Programmes objectives are correctly answered in the Programme's implementation	• Programme data analysis • Beneficiary Survey • Scoping interview • Contribution analysis • Open Public Consultation • Literature review • Stakeholder interviews • Case studies	- 4.1 - Annex VII.
<u>To what extent have the low success rates of applications, in relation with the Culture strand affected the Programme's effectiveness? What is the impact among failed applicants? What reputational influence does this have on the Programme's image?</u>	• Number of applications to the Programme • Perception of the applicants	• Programme data analysis • Beneficiary Survey • Stakeholder interviews	• 4.1
<u>To what extent do the indicators for the Culture strand identified for the Programme in the legal base correspond to the monitoring purposes? Should additional ones be proposed? If yes, what should be the new indicators to be added?</u>	• Indicators on track to target established • Suggestion for refinement in conclusion of the document	• Programme data analysis • Desk research	• 4.1 • Conclusions and Lessons-learned • Annex VII
<u>How did the Covid-19 pandemic impact the implementation of the Culture strand of two generations of the Programme, and what was the effect of the measures taken to mitigate the impact of the pandemic?</u>	• Adaptation of the different actions and of the Programme to answer the consequences • Results obtained by the Programme as a result of the Covid-19 pandemic	• Programme data analysis • Stakeholders' interviews • Desk research	• Chapter 3 • 4.1

<u>What was the effect of the measures taken in the frame of the Programme implementation to provide a reaction to the consequences of the Russian invasion of Ukraine?</u>	• Increased participation of Ukrainian organisations in the Programme	• Programme data analysis • Desk Research	• Chapter 3 • 4.1
<u>As regards Culture, to what extent have supported activities contributed to the creation of a European cultural space?</u>	• Positive feedback from Programme participants • Number of organisations participating in the Programme • Number of beneficiaries of a cultural mobility • Number of pan-European Networks, Platforms, cultural entities supported by the Programme • Number of artists supported by a European entity • Evidence of cultural organisations collaborating together after the completion of a project	• Programme data analysis • Desk research • Stakeholder interviews • Scoping interviews • Open Public Consultation • Contribution analysis • Case studies	• 4.1 • 4.2 • Conclusions and lessons-learned
<u>Has the Programme facilitated collaboration between cultural organisations and their partners in third countries? Is the collaboration lasting beyond the implementation of the project?</u>	• Percentage of organisations that keep on collaborating after the completion of the projects • Number of projects with organisations based in third countries	• Programme data analysis • Stakeholder interviews • Case studies	• 4.1
<u>What are the effects of the simplification measures introduced in the 2021-2027 Programme (i.e. lump sums) on the</u>	• High proportion of SMEs in the Creative Europe 2 • Feedback from Programme beneficiary	• Programme data analysis • Beneficiary Survey	• 4.1

<u>applicants, in particular for SMEs?</u> <u>Quantify wherever possible.</u>			
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Efficiency:

Evaluation questions	Judgement criteria and indicators of success	Data collection methods	Section of the Staff Working Document
<u>What is the cost-efficiency of various actions of Creative Europe 2021-2027 and Creative Europe 2014-2020?</u>	•	• Programme data analysis	• 4.1 • Annex IV
<u>To what extent is/was the size of budget appropriate and proportionate to what Creative Europe 2021-2027 and Creative Europe 2014-2020 set out to achieve? To what extent is/was the distribution of funds across the strands / Sub-programme and actions / measures (sectoral or multi-sectoral) appropriate in relation to their level of effectiveness and utility?</u>	• Increase in funded projects in the Culture strand over the 2021-2027 • Increase of the number of submitted proposals showing the attractiveness of the Programme for potential beneficiaries • Results achieved by the Programme	• Programme data analysis • Counterfactual and Contribution analysis • Stakeholder interview • Beneficiary Survey •	• 4.1 • Annex IV
<u>To what extent are the monitoring mechanisms of the beneficiaries and participants applied by the Commission and the Executive Agency efficient /cost efficient and proportionate, and have they been simplified in the new period? Is there scope for further simplification in all Programme strands and actions?</u>	• Results of the Programme achieved in relation with the different indicators • Level of details on data obtained on Creative Europe 1 results compared to data obtained for the Creative Europe 2 • Cost-efficiency analysis of the Programme result	• Programme data analysis • Programme performance statements	• 4.1 • Conclusions and lessons-learned • Annex IV • Annex VII

Relevance

Evaluation questions	Judgement criteria and indicators of success	Data collection methods	Section of the Staff Working Document
<u>To what extent have the Creative Europe Programme's general, specific and operational objectives proved relevant to the current and emerging needs of the sectors covered by the Culture strand in Europe? What is the relevance of the Creative Europe Programme 2021-2027 compared to the relevance of the Creative Europe Programme 2014-2020?</u>	• Alignment with EU overarching priorities in the fields of Greening, Digital and Social inclusion • Alignment with EU policy priorities in the field of culture and audiovisual • Alignment with EU priorities in other fields (mobility, artists working conditions, etc).	• Desk research • Programme data analysis • Stakeholders' interviews • Case studies	• 4.3
<u>To what extent are the needs and challenges linked to Europe's green and digital transitions reflected in the actions/activities of the Culture strand under Creative Europe 2021-2027?</u>	• Alignment with EU overarching priorities in the fields of Greening • Contribution of the Programme to EU Greening efforts	• Desk research • Programme data analysis	• 4.3
<u>To what extent are the needs of the different stakeholders addressed by the Culture strand of Creative Europe Programme objectives? In cases where some target groups are not sufficiently addressed, what factors are limiting their access?</u>	• Number of social inclusion projects for disadvantaged groups • Sectoral approach developed under Culture strand of Creative Europe 2	• Desk research • Programme data analysis	• 4.1 • 4.3
<u>To what extent are current and emerging key socio-economic needs and challenges that Europe is facing internally and globally reflected in the policy priorities, objectives and actions/activities of the Culture strand of Creative Europe 2021-2027?</u>	• Number of projects and collaboration with non-EU countries • Alignment with EU priorities • Adaptation of the Programme to emerging needs (AI, Russian War of aggression in Ukraine)	• Creative Europe 2 Intervention logic • Desk Research • Programme data analysis • Stakeholders' interviews • Case studies • Open Public Consultation	• 2 • 4.1 • 4.3
<u>How well is the Creative Europe Programme known to the culture strand communities? In case some target groups are not sufficiently reached,</u>		• Open Public Consultation • Stakeholder interviews	• Annex V

<u>what factors are limiting their access and what actions could be taken to remedy this? What are the reasons of non-participation of certain target groups, are there groups who chose not to participate or are there always external factors preventing them?</u>			
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Coherence

Evaluation questions	Judgement criteria and indicators of success	Data collection methods	Section of the Staff Working Document
<u>To what extent are the objectives of different programme Sub-programmes/strands fields within Creative Europe Programme consistent and mutually supportive? What is the coherence of the Creative Europe Programme 2021-2027 compared to the coherence of the Creative Europe Programme 2014-2020? Has it been improved in the new Programme generation?</u>	• There is evidence that the strand-based approach of the Programme allow it to function as three distinct but complementary elements that allows it to reach the different Cultural and Creative Sectors • The challenges faced by the CCS are translated in the Programme's objectives • Better availability and quality of monitoring data from CE2 in comparison to CE1 • Improvement of the action in the Culture strand with strengthened coherence between the objectives and the actions of the strand	• Programme data analysis • Desk Research	• 4.1

<u>Do duplications, overlaps, or other disadvantageous issues exist between the actions under the Culture strand and how are they dealt with?</u>	No evidence found	Programme data analysis	4.1
<u>To what extent has the Culture strand of the Creative Europe Programme proved complementary to other EU interventions/initiatives in the sectors covered by the Culture strand?</u>	Evidence found that the actions under the Culture strand were coherent and complementary with other EU Programmes such as Horizon, Erasmus+, CERV, the RRF and the ERDF	Desk research	4.1
<u>To what extent is the Culture strand of the Creative Europe Programme coherent with various interventions pursued at national level which have similar objectives? To what extent has the Culture strand of the Creative Europe Programme proved complementary to other Member States' interventions/initiatives in the fields covered by the strand?</u>	Evidence found that similar objectives and funding with national can share similar objectives and funding opportunities at national level, but these are typically focused on specific sub-sectors or individual countries	- Desk research - Case studies	4.1

European added value

Evaluation questions	Judgement criteria and indicators of success	Data collection methods	Section of the Staff Working Document
<u>What is the additional value and benefit resulting from EU activities under the Culture strand, compared to what could be achieved by Member</u>	Complementarity with other available support programmes	- Desk research - Stakeholder survey - Contribution analysis	4.1

<u>States and other countries associated to the Programme at national and/or regional and/or international levels? What is the benefit and added value of the Culture strand of the Programme 2021-2027 compared to the benefit of the Creative Europe Programme 2014-2020?</u>			
<u>What does the Culture strand of the Creative Europe Programme 2021-2027 offer in addition to other support schemes to the sectors covered by the Culture strand available at both international and national levels?</u>	• Number of supported projects with a transnational nature	• Desk research • Programme data analysis	• 4.1
<u>What has been the leverage of the EU on the Culture strand of Creative Europe Programmes in its international relations?</u>	• Number of supported projects involving third-countries organisations	• Programme data analysis	• 4.1 • Annex VII

CROSS SECTORAL Strand

Effectiveness

Evaluation questions	Judgement criteria and indicators of success	Data collection methods	Section of the Staff Working Document
<u>To what extent has the strand (both Creative Europe 2021-27 and Creative Europe 2014-2020) delivered the expected outputs, results and impacts? What negative and positive factors seem to be influencing outputs, results and impacts? Have there been any unintended effects?</u>	• The Programme is on track with the different indicators and targets it set. • The Programmes objectives are correctly answered in the Programme's implementation	• Programme data analysis • Beneficiary Survey • Scoping interview • Contribution analysis • Open Public Consultation • Literature review • Stakeholder interviews • Case studies	- 4.1 - Annex VII.
<u>To what extent have the low success rates of applications, in relation with the cross-sectoral strand affected the Programme effectiveness? What is the impact among failed applicants?</u>	• Number of applications to the Programme • Perception of the applicants	• Programme data analysis • Beneficiary Survey • Stakeholder interviews	• 4.1
<u>Which of the current activities or elements of the Programme would be likely to continue and in which form if EU support was withdrawn or substantially decreased?</u>	• Number of applications to the Programme • Perception of the applicants	• Programme data analysis • Beneficiary Survey • Stakeholder interviews	4.1

<u>To what extent do the indicators for the cross-sectoral strand identified for the Programme in the legal base correspond to the monitoring purposes? Should additional ones be proposed? If yes, what should be the new indicators to be added?</u>	• Indicators on track to target established • Suggestion for refinement in conclusion of the document	• Programme data analysis • Desk research	• 4.1 • Conclusions and Lessons-learned • Annex VII
<u>Has the Programme facilitated collaboration between media outlets?</u>	• Number of organisations from different Member States collaborating	• Programme data analysis • Stakeholder interviews • Case studies	• 4.1

Efficiency:

Evaluation questions	Judgement criteria and indicators of success	Data collection methods	Section of the Staff Working Document
<u>What is the cost- benefit of various actions of Creative Europe 2021-2027 and Creative Europe 2014-2020?</u>	• Comparison of costs with benefits	• Programme data analysis	• 4.1 • Annex IV
<u>To what extent is/was the size of budget appropriate and proportionate to what Creative Europe 2021-2027 and Creative Europe 2014-2020 set out to achieve?</u>	• Increase of the number of submitted proposals showing the attractiveness of the Programme for potential beneficiaries • Results achieved by the Programme • Scale of common challenges across Europe	• Programme data analysis • Stakeholder interview • Beneficiary Survey	• 4.1 • Annex IV

<u>To what extent are the monitoring mechanisms of the beneficiaries and participants applied by the Commission and the Executive Agency efficient /cost efficient and proportionate? Is there scope for further simplification?</u>	• Level of details on data obtained • Cost-efficiency analysis	• Programme data analysis • Programme performance statements	• 4.1 • Conclusions and lessons-learned • Annex IV • Annex VII
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Relevance

Evaluation questions	Judgement criteria and indicators of success	Data collection methods	Section of the Staff Working Document
<u>To what extent have the general, specific and operational objectives proved relevant?</u>	• Alignment with EU policy priorities in the field of news media and CCS.		• 4.3 • Annex V • Annex VII
<u>To what extent are the needs and challenges linked to Europe's green and digital transitions reflected?</u>	• Alignment with EU overarching priorities in the fields of Greening Contribution of the Programme to EU Greening efforts		• 4.3 • Annex V • Annex VII
<u>To what extent are the needs of the different stakeholders addressed?</u>	Geographic and sectoral diversity of applicants and projects funded.		• 4.3 • Annex V • Annex VII
<u>How well are the funding opportunities known to stakeholders?</u>			• 4.3 • Annex V • Annex VII

Coherence

Evaluation questions	Judgement criteria and indicators of success	Data collection methods	Section of the Staff Working Document
<u>To what extent are the objectives of different actions consistent and mutually supportive?</u>	• The challenges faced by the news media are translated in the Programme's actions • The common challenges faced by the CCS are translated in the Creative Innovation Lab.	• Programme data analysis • Desk Research	• 4.1 • Beneficiary survey
<u>To what extent has the cross-sectoral strand proved complementary to other EU interventions/initiatives on news media and the CCS ?</u>	• Evidence found that the actions were coherent and complementary with other EU Programmes such as Horizon, CERV, the RRF and the ERDF	• Desk research	• 4.1
<u>To what extent is the Culture strand of the Creative Europe Programme coherent with Member States'</u>	• Evidence found that similar objectives and funding with national can share similar objectives and funding opportunities at national level, but these are typically	• Desk research	• 4.1

<u>interventions in the fields covered by the strand?</u>	focused on specific sub-sectors or individual countries		
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European added value

Evaluation questions	Judgement criteria and indicators of success	Data collection methods	Section of the Staff Working Document
<u>What is the additional value and benefit resulting from EU activities compared to what could be achieved by Member States?</u>	• Common challenges shared across Member States • Economies of scale • Network effects	• Desk research • Stakeholder survey	• 4.2
<u>What does the cross-sectoral strand offer in addition to other support schemes available at both international and national levels?</u>	• European strategy and objectives • Number of supported projects with a transnational nature	• Desk research • Programme data analysis	• 4.2

ANNEX IV. OVERVIEW OF BENEFITS AND COSTS [AND, WHERE RELEVANT, TABLE ON SIMPLIFICATION AND BURDEN REDUCTION]

Table 1. Overview of costs and benefits identified in the evaluation¹³²
CREATIVE EUROPE 1

		Citizens/Consumers		Businesses		Administrations		Sectoral	
		Quantitative	Comment	Quantitative	Comment	Quantitative	Comment	Quantitative	Comment
[Cost or Benefit description]:									
		Provide the monetary value	Where no quantification is possible, please provide ranges or explain the reasons why	Provide the monetary value	Where no quantification is possible, please provide ranges or explain the reasons why	Provide the monetary value	Where no quantification is possible, please provide ranges or explain the reasons why	Provide the monetary value	Where no quantification is possible, please provide ranges or explain the reasons why
MEDIA: Increased competitiveness of the European AV sector	Benefit	Increased availability of European works for audiences: Cinemas: 5.6 additional territories per supported work 12959 additional total territories. TV: 9.05 additional territories. 17,379 additional total territories	Increased access and enjoyment of works translating into box office receipts presented under business in next column.	241,238,311 additional European cinema admissions associated with MEDIA with an estimated revenue of EUR 1,736,915,842 in additional cinema box-office receipts. 141,121 new jobs working on projects supported by MEDIA across	Additional financial value likely to be generated through distribution of supported films and TV series on TV and VoD but equivalent viewing figures and associated estimates of financial returns not yet available. Multiplier effects expected	Supported films are associated with additional box office sales of EUR 4.02 for every 1 EUR invested by MEDIA ¹³³ (EUR 3.75 with administrative costs)		Increased sector capacity to produce and distribute good quality European programming that is attractive to cinemas, VoD providers, broadcasters and reach European audiences outside of domestic markets.	Monetary value presented in relation to box office returns.

		VoD: additional territories 2.83. 6,322 additional total territories		Creative Europe 1. 95% of organisations reporting reported an improved market position at the end of their project (88% of all organisations, N=1976)	for capacity and competitiveness of European AV businesses and sector.			Building a European industrial ecosystem by structuring professional networks of collaboration across national borders. Strengthening the single market for audiovisual media services and content, as envisaged by the Audiovisual Media Services Directive, and notably the fulfilment of	
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¹³² Where there is a prior impact assessment, the table should contain as a minimum the costs/benefits identified in the IA with the information gathered on the actual cost/benefit. As available, the table should include the monetisation (€) of the costs/benefits based on any quantitative translation of the data (time taken, person days, number of records/equipment/staff etc. affected or involved represented in monetary value – see Standard cost model, for example). For all information presented, it should be included in the comments section whether it relates to all Member States or is drawn from a subset. An indication of the robustness of the data should be provided in Annex II on Methodology and analytical models used.

¹³³ As explained in the text of the report, the exact return of MEDIA investment could not be calculated due to missing data on key variables, in particular production and marketing budgets of EU films screened in the EU, both supported and unsupported. Based on a total investment in relation to films of EUR 431,760,402 including development (feature films): EUR 82,766,639.85; Distribution (films): EUR 242,519,983; Cinema network: EUR 82,186,280; Festivals EUR 24,287,500; plus MEDIA administration equivalent share (56% of total MEDIA operational budget) 31044569: Grand total EUR 462,804,971. Equivalent to EUR 2.76 per additional admission (EUR 2.96 when inclusive of equivalent programme administration costs). Actions not included in the main audience measure described above are market access and capacity building actions, VoD actions, film education, and content actions supporting production of TV series and video games. Equivalent monetisation is not possible in these actions due to the lack of suitable monitoring data to assess impacts and associated monetary benefits.

								European content quotas. Increased capacity to invest in new works and innovations in the context of international competition and the digital transition.	
MEDIA: Support for the development and production of new European AV content	Benefit	A total of 3,383 development titles supported across a total of 1,818 projects. Of which: 2,368 films 682 TV series 122 shorts 209 Video games and immersive content 371 TV productions. Estimated 28.8% ¹³⁴ of	Monetised value of support is quantified under competitiveness.	Share of supported works co-productions CE 1: 36% (in comparison to 12% of released European titles 2014 - 2023). Support to approximately 1,485 ¹³⁵ independent producers to develop and produce original European AV content. Increased visibility of projects reported	Monetised value of impacts presented under competitiveness.	Leveraged industry investment of EUR 1,754,327,546 based on MEDIA investment of EUR 236,006,151 (1:7.43)		Women writers and directors for 30% and 35% of all supported works. Increase of 20pp for directors and 14pp for writers, 2014 to 2020 (in comparison to industry trends of 8pp increase in women roles from 2015 to 2020. 2022 AV fiction: Directors: 28%. Writers 39%.)	

¹³⁴ Estimated share based on a review of development works against the IMDb database that was conducted as part of the counterfactual impact analysis.

¹³⁵ Unique beneficiaries of content actions.

		film and TV development titles (equating to 961 titles) have gone on to public release.		74% (n=668 of beneficiaries.				25% of all works supported by the Programme in lesser used languages. 14pp increase in the share over the CE 1 Programme, from 23% in 2014 to 37% in 2020.	
MEDIA: Support for the development and production of new European AV content	Cost			Beneficiary contribution: EUR 1,754,327,546 including: Contribution to development: EUR 116,928,7146 Contribution to production: EUR 585,040,400		MEDIA grant: EUR 236,006,151 including: Development total grant: AV EUR 111,677,653 Video games: EUR 20,108,076 Productions total grant: EUR 104,220,422			
MEDIA: Support for increased circulation of works	Benefit	Increased awareness of high potential works outside of domestic territories through	Increased circulation of works presented under competitiveness.	Direct support for distribution of works across a total of 8,969 territories at an average of		Leveraged industry investment of EUR 485,644,274.20 based on MEDIA		Strengthening the single market for audiovisual media services and content, as envisaged by	

		coordinated distribution and marketing activities. Unsupported works average nondomestic distribution territories (Film in cinema both iterations): 0.65		29,015 euro per territory ¹³⁶ . Support for 148 organisations to undertake promotion and marketing activities of supported works. 772 sales agents and 458 distributors supporting distribution of works with MEDIA support. Increased attractiveness of European titles for distributors and sales agents including reduced risks associated with distributing AV content outside of domestic markets.		investment of EUR 242,519,983.20 (1:2)		the Audiovisual Media Services Directive, and notably the fulfilment of European content quotas	
MEDIA: Support for increased circulation of works	Costs			Beneficiary contribution: EUR 485,644,274.20		MEDIA grant: EUR 242,519,983.20			

¹³⁶ Inclusive of total distribution grant plus equivalent share of MEDIA administration costs (31% equalling EUR 17,715,629.30).

MEDIA: Support for increased business capacity of the European AV sector	Benefit			404 Networking and market access projects with a total of 669,343 reported participants. 18 MEDIA stands with 3,156 reported participants (16 stands reporting). Training for 13,478 participants (52% women) across approximately 90 distinct projects. 88% of participants reported using the learning in their work (88%). 29% of training funding to beneficiary organisations based in LCC countries.	Quantitative data on impacts on business capacity not available.	Leveraged industry investment of EUR 163,451,664 based on MEDIA investment of EUR 107,008,256 (1:1.52)			
MEDIA: Support for increased business capacity of the European AV sector	Cost			Beneficiary contribution: EUR 163,451,664		MEDIA grant: EUR 107,008,256 including:			

						Support to training EUR 53,004,258 Markets and networking EUR 51,544,570 Media stands EUR 24,59428			
MEDIA Support for the development of audiences and showing of European AV content	Benefit	More opportunities for European audiences to see nondomestic content.	Value of investment presented under competitiveness.	1,143 cinemas in the Cinema Network by the end of 2020, an increase of 275 in the number of cinemas in the networks over the period. The network collectively held 6,657,851 screenings of non-national European films over the period Support for 123 festivals (353 total) with a combined audience of 17,625,592 31 VoD provider projects with	Value of the investment in films and cinemas presented under competitiveness.	Leveraged industry investment of EUR 611,856,523 based on MEDIA investment of EUR 95,658,718 (1:6.39)			

				increased size of user base for supported platforms: 52% increase in registered users and subscribers (2016: 10,729, 888. 2020: 16,322,535) 20 film education projects and 34 Audience development projects.					
MEDIA Support for the development of audiences and showing of European AV content	Cost			Beneficiary contribution: EUR 611,856,523 including: Cinema network: EUR 167,340,461 Film education and audience development: EUR 8,159,549 Film festivals: EUR 362,688,179 VOD: EUR 33,810,307		MEDIA grant: EUR 95,658,718 including Cinema Network: EUR 82,186,280 Film education and audience development EUR 12,127,608 Film Festivals 24,287,500 VOD: EUR 16,699,094			

				Online promotion: EUR 39,858,027					
MEDIA: Effective administration of the MEDIA strand	Benefit			Good quality reputation for MEDIA amongst target sectors and beneficiaries with good quality applications.		Effective and efficient administration of Programme funds in line with the Programmes objectives and priorities that support the delivery of results and impacts.			
MEDIA: Effective administration of the MEDIA strand	Cost					Administration costs: 4% of total Programme budget Total MEDIA administration costs: EUR 55,436,730.27 CNECT EUR 7,543,821 ¹³⁷ EACEA: EUR 49,603,370			
CROSS: Support to improve access to finance for the CCS	Benefit			Engaged 21 financial		Leveraged EUR 1.6			

¹³⁷ Not inclusive of 17% of CNECT administrative budget that is allocated to administration of Cross sectoral.

				intermediaries from 12 different countries to develop their capacity to lend to the cultural and creative sectors. Supported lending to 6,803 cultural and creative sector organisations from 21 countries that supported a reported 53,710 jobs ¹³⁸ (EUR 4,768 per job). 1% default rate (to date) in line with industry expectations that demonstrates that the viability of lending to the cultural and creative sector.		billion in lending - leverage ratio of 6.9 that significantly exceeded the indicative leverage effect of 5.7 (indicator vi)			
CROSS: Support to improve access to finance for the CCS	Cost			Commercial lending of EUR 1.6 billion.		CROSS budget of EUR 252.7 million			

¹³⁸ Programme monitoring data. Data on jobs supported is accounted for through the summation of FTEs of final recipients at time of loan inclusion.

CROSS: Providing information and support to applicants and communicate results	Benefit			Desks promoted the Creative Europe Programme and provided information about actions and calls. Desks the most important and trusted source of information about the Programme for new and prospective beneficiaries.		Desks established in all participating countries. Established connections between Creative Europe Programme, national authorities, and national CCS and organisations. Supported horizontal sharing of results and experiences between Desks.			
CROSS: Providing information and support to applicants and communicate results	Cost					CROSS grant: EUR 36,261,653.05 Beneficiary contribution: EUR 40,673,309.67			
CROSS: Effective administration of the CROSS strand	Benefit			Good quality reputation for MEDIA amongst target sectors and beneficiaries		Effective and efficient administration of Programme funds in line			

				that lowers administrative barriers for entry to good quality applications.		with the Programmes objectives and priorities that support the delivery of results and impacts.			
CROSS: Effective administration of the CROSS strand	Cost					Total administrative : EUR 13,582,071. 2% of total Programme budget. Including: EAC: EUR 895,900.26 (12% of EAC administrative budget) CNECT: EUR 1,568,174.47 (17% CNECT administrative budget) EACEA: EUR 7,697,075 (13% of EACEA budget)			

Table 1. Overview of costs and benefits identified in the evaluation¹³⁹
CREATIVE EUROPE 2

		Citizens/Consumers		Businesses		Administrations		Sectoral	
		Quantitative	Comment	Quantitative	Comment	Quantitative	Comment	Quantitative	Comment
[Cost or Benefit description]:									
		Provide the monetary value	Where no quantification is possible, please provide ranges or explain the reasons why	Provide the monetary value	Where no quantification is possible, please provide ranges or explain the reasons why	Provide the monetary value	Where no quantification is possible, please provide ranges or explain the reasons why	Provide the monetary value	Where no quantification is possible, please provide ranges or explain the reasons why
MEDIA: Support for New European AV content	Benefit	A total of 1,786 titles supported to date at development and production stages of which 1688 films, TV series and shorts 100 video games 104 TV and online content productions	Full results not yet available Increased access and enjoyment of works translating into box office receipts presented under business in next column.	Higher rates of coproductions for supported works (86%) in comparison to unsupported works (12%). Increased share of coproductions involving LCC (30% of all co-productions) in comparison to CE 1 and increase of 25pp from CE 1.	Full impact of support on admissions and circulation not yet available. Additional financial value likely to be generated through distribution of supported films and TV series on TV and VoD but equivalent viewing figures and associated estimates of			Women writers and directors for 44% and 42% of supported work. Increase between CE 1 and CE 2: Directors: 12percentage points. Writers: 9pp. 32% of supported works in lesser used languages	

					financial returns not yet available. Multiplier effects expected for capacity and competitiveness of European AV businesses and sector.				
MEDIA: Support for New European AV content	Cost			Beneficiary contributions: Total EUR: 287,341,905		MEDIA grant: EUR 159,292,213			
MEDIA: Support for the circulation of European AV content	Benefit	Increased awareness and availability of high potential works outside of domestic territories through coordinated distribution and marketing activities.	Full results and impacts are not yet available for works supported under Creative Europe 2.	Based on the results of Creative Europe 1 the current Programme is likely to continue to deliver comparable results and impacts and onward multiplier effects.	Full results and impacts are not yet available.				

¹³⁹ Where there is a prior impact assessment, the table should contain as a minimum the costs/benefits identified in the IA with the information gathered on the actual cost/benefit. As available, the table should include the monetisation (€) of the costs/benefits based on any quantitative translation of the data (time taken, person days, number of records/equipment/staff etc. affected or involved represented in monetary value – see Standard cost model, for example). For all information presented, it should be included in the comments section whether it relates to all Member States or is drawn from a subset. An indication of the robustness of the data should be provided in Annex II on Methodology and analytical models used.

				Continuing to enhance the attractiveness of European titles for distributors and sales agents including reduced risks associated with distributing AV content outside of domestic markets. Continuing to support the distribution of European AV works across more European and international territories resulting in wider availability of non-domestic European content for European audiences. Further improving the coordination of marketing of high potential works across theatres and						
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				online that raises awareness and profile of European works outside of domestic markets.					
MEDIA: Support for the circulation of European AV content	Cost			Beneficiary contribution EUR: 61,844,724		MEDIA grant: EUR 77,500,000			
MEDIA: Support for the capacity of European AV sector	Benefit			Continued support for networking market access and capacity building activities for AV professionals and firms and the introduction of new actions to support capacity building in the context of digital transition. Support for 76 Markets and networking projects with a total of 150,330 participants to date. Continued support for	Full results and impacts not yet available.				

				MEDIA stands with 14 Stands produced with a total of 2,003 participants to date. 59 Training projects with 1,646 participants 52.5% of participants were female. 71% participants improved competencies or increased employability. 52 projects supporting innovative or integrated business models across 75 beneficiary organisations					
MEDIA: Support for the capacity of European AV sector	Cost			Beneficiary contribution: EUR 109,539,893		MEDIA Grant: EUR 104,873,778 MEDIA stands budget: EUR 9,500,000			

MEDIA: Support for audiences and showing of European AV content	Benefit			Continued support for to the Europa cinemas network adding a further 65 cinemas added to the Europea Cinemas networks, bringing the network to 1,208 participating cinemas that have collectively shown a further 2,195 screenings of non-domestic European films across. Support for 173 film festivals showing a high proportion of European content, plus support for 12 networks and collaborations between film festivals. Support for 17 collaborations between European VOD operators showing a high	Full results and impacts not yet available				
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				proportion of European content. 23 film education projects supported. 80 high quality European titles promoted through the Film Moves action.					
MEDIA: Support for audiences and showing of European AV content	Cost			Beneficiary contribution: EUR 33,985,431		MEDIA grant: EUR 147,906,309			
MEDIA: Effective administration of the MEDIA strand	Benefit			Good quality reputation for MEDIA amongst target sectors and beneficiaries that lowers administrative barriers for entry to good quality applications.		Effective and efficient administration of Programme funds in line with the Programmes objectives and priorities that support the delivery of results and impacts.			
MEDIA: Effective administration of the MEDIA strand	Cost					Total administration: EUR 94,423,525.20 Administrati			

						on costs 4% of total operational budget Including CNECT EUR 22,034,491.9 6 EACEA: EUR 72,389,033 (58% share of EACEA budget)			
CROSS: Support development of multimedia technologies	Benefit			Increased support for the development of innovative approaches to the multimedia technologies in the cultural and creative sectors. Support for cross sectoral partnerships between AV and cultural sector organisations and associated applications.	Full results and impacts not yet available				

CROSS: Support development of multimedia technologies	Cost			Beneficiary contribution: EUR 12,286,228.29		CROSS grant: EUR 30,779,889.39			
CROSS: Supporting news media sectors	Benefit			Support for systemic collaborations amongst media organisations to improve the trust worthiness of news content and viability of business models. Support for projects that are developing and sharing knowledge, resources, tools, and curricula for media literacy Support for specific projects to monitor media freedom and pluralism and rapid responses to violations of press and media freedoms	Full results and impacts not yet available				
CROSS: Supporting news media sectors	Cost			Beneficiary contribution: EUR 10,635,439.93		CROSS grant: EUR 45,631,457.99 including:			

						Journalism partnerships: EUR 33,957,785.62 Media literacy projects: EUR 5,476,383.03 Media freedom and pluralism projects: EUR 3,997,730.74 Media pluralism monitor: EUR 2,199,558.60			
CROSS: Supporting prospective applicants, beneficiaries, and communicating results	Benefit			Promoted the Programme and provided information about calls through 1,466 events involving 326,504 participants. Continued to be the most important and trusted source of information for new and prospective beneficiaries.		Desks established in all participating countries. Continued to facilitate connections between Creative Europe Programme and national CCS. Continued to support horizontal sharing of results and			

						experiences between Desks			
CROSS: Supporting prospective applicants, beneficiaries, and communicating results	Cost					CROSS grant: EUR 24,040,919.74			
CROSS: Effective administration of the Cross sectoral strand	Benefit					Effective and efficient administration of Programme funds in line with the Programmes objectives and priorities that support the delivery of results and impacts.			
CROSS: Effective administration of the Cross sectoral strand	Cost					Total administration costs: EUR 18,826,930 1% of total Programme budget including: EAC: EUR 1,126,452 (8.1 % of administrative budget)			

						CNECT: EUR 2,670,622.92 (10.8% administrative budget) EACEA: EUR 15,029,855 (9% of administrative budget)			
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TABLE 2: Simplification and burden reduction (savings already achieved)

Report any simplification, burden reduction and cost savings **achieved already** by the intervention evaluated, including the points of comparison/ where available (e.g. REFIT savings predicted in the IA or other sources).

	Citizens/Consumers/Workers		Businesses		Administrations		Creative Europe beneficiaries and participants	
	Quantitative	Comment	Quantitative	Comment	Quantitative	Comment	Quantitative	Comment
Burden reduction following the introduction of simplification measures: lump sums The introduction of lump sums aimed to shift focus from reimbursing expenses to reimbursing the achievement of outputs and deliverables. The use of lump sums has been introduced covering approximately 50% of MEDIA support.								
Recurrent						Reduced administrative burden, reducing overheads and facilitating productivity gains		This participated in a reduction in the average time to grant (TTG) for beneficiaries.
Burden reduction following the introduction of simplification measures: streamlining of distribution schemes								
Recurrent					Distribution Automatic scheme was streamlined to consolidate small grants, and the number of grant contracts fell from over 1,000 to	Reduced administrative burden, reducing overheads and facilitating productivity gains		Participated in reduction of number of grants to 806 in 2020 in comparison to 1475 in 2014, a 46% decrease. Also, an increased grant size, from EUR 53,000 in 2014 to EUR

					approximatel y 300 annually.			165,000 in 2020.
					Distribution Selective scheme consolidation of grants from on average 206 grants in 2014 to an average of 21 grants in 2020, for a similar level of support.			
PART II: II <u>Potential</u> simplification and burden reduction (savings)								
<i>Identify further potential simplification and savings that could be achieved with a view to make the initiative more effective and efficient without prejudice to its policy objectives¹⁴⁰.</i>								
	Citizens/Consumers/Workers		Businesses		Administrations		[Other...] _ specify	
	Quantitative	Comment	Quantitative	Comment	Quantitative	Comment	Quantitative	Comment
Description:								
Type: One-off / recurrent (select)								

¹⁴⁰ This assessment is without prejudice to a possible future Impact Assessment.

Culture

Table 1. Overview of costs and benefits identified in the evaluation (Creative Europe Culture 2014-2020)

		Citizens/Applicants/EU society		EU Public Administration & Implementing bodies		Creative Europe beneficiaries	
		Quantitative	Comment	Quantitative	Comment	Quantitative	Comment
I. COSTS							
Culture Sub-programme Budget	Type: One-off and recurrent			Financial envelope for the programming period 2014-2020 (under direct management): EUR 1,46 billion for the entire Programme, 31% for the Culture Sub-programme). Actual Spending for the programming period 2014-2020 (all under direct management): EUR 491,478,128 million			
Administrative costs of implementing Creative Europe-Culture	Type: recurrent			Administrative line (executed commitments 2014-2020): EAC: EUR 7,770,167 million CNECT: EUR 9,111,996 million	EACEA FTEs: for Culture: 37 in 2019 39 in 2020		

				EACEA: EUR 85,523,052 million ¹⁴¹			
Costs for Creative Europe applicants and beneficiaries	Type: recurrent	Not possible to quantify	Administrative costs linked to the application process and meeting the eligibility requirements. These include Length of the application and grant process, financial capacity checks.			Minimum co-financing: 40% for small-scale cooperation projects, 50% for large scale cooperation projects, 50% for literary translation projects. Average co-financing rate for Culture: 46% [source: supporting study]	Administrative costs related to the application, implementation and reporting requirements. These include Length of the application and grant process, financial capacity checks, budget and payment justifications, grant management reporting (for the beneficiaries) Projects beneficiaries must complement the project budget with sources of co-financing other than the EU grant, which vary depending on the action.
II. BENEFITS							
Direct benefits	Type: recurrent	Contribution to policy priorities set under EU Work Plans for Culture (2011-2014, 2015-2018, 2019-2022),	Contribution to priorities set by the European Commission for the 2019-2024 period: A European Green Deal, A Europe fit for the digital age, An economy that works for people, A stronger			A total of 7,538 cultural activities supported, including 515 exhibitions, 483 festivals, 321	Increased capacity of organisations: common benefits include enhanced internationalisation, experience in

¹⁴¹ Current methodology, endorsed by DG BUDG and approved by the Steering Committee for calculating the costs, is by programme.

		The New European Agenda for Culture 2018, the 2016 Joint Commission/High Representative Communication “Towards and EU strategy for international cultural relations” and the 2014 Commission Communication “Towards an integrated approach to cultural Heritage for Europe” A total of 7,538 cultural activities supported, including 515 exhibitions, 483 festivals, 321 concerts and 201 tours. 431 projects supported in the book and publishing sector, with over 3000 translations of literary works, from around 40	Europe in the world, Promoting a European way of life, A new push for democracy. Contribution to large scale policy progresses at EU and national levels, supporting the sectors’ needs and supporting more cohesive policy approaches across Member States Contribution to Creating a European network of cultural actors, building a sense of European identity and awareness of EU values across participating countries Contribution to SDG 8 Increase in the diversity of audiences accessing culture Increased awareness of societal challenges through accessing culture Enhanced mutual understanding of different cultural and linguistic traditions through accessing culture. Increase in circulation and readership of literature Increase in readership of EU produced literature			concerts and 201 tours. 491 small-scale cultural cooperation projects supported (receiving an average of €188k per project) 128 large-scale cultural cooperation projects supported (receiving an average of €1.5 million per project) 4,200 organisations from the sector involved in transnational projects 296,083 mobility days for cultural and creative professionals 22,763 professionals within the sector internationalising their careers and	transnational and international cooperation, strengthen their capacities, produce innovative approaches, exchange good practices, expanded networks, etc. Stronger international networks within the CCS leading to long term collaboration and a more competitive sector Increase in cross-border mobility and transnational circulation of artists, professionals and works Increase in contracts and job prospects of supported individuals Stronger skills, competencies and know-how within the cultural and creative sector
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		source languages into 30 target languages 1 106 actions focused on the theme of diversity and inclusion [source: supporting study]	Increase in collaboration across the EU's CCS to stimulate the creation, circulation and visibility of cultural works Increase in access to culture with larger audiences consuming cultural content		gaining experience of working in other countries 660 artistic residencies supported to show and create new work in other countries. 1,106 actions focused on the theme of diversity and inclusion European networks: 180 projects supported (receiving an average of EUR 223k per project) European Platforms: 81 capacity building projects supported (receiving an average of EUR 493k per project). 431 projects supported in the book and publishing sector, with over 3,000 translations of	
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						literary works, from around 40 source languages into 30 target languages [source: supporting study]	
Indirect benefits	Type: recurrent	Not possible to quantify	Multiplier effect: candidate, beneficiary and participating organisations raise capacity in other organisations (through network-building, knowledge exchange, capacity-building).				Multiplier effect: candidate, beneficiary and participating organisations raise capacity in other organisations (through network-building, knowledge exchange, capacity-building).

Table 2. Overview of costs and benefits identified in the evaluation (Creative Europe Culture 2021-2027)

		Citizens/Applicants/EU society		EU Public Administration & Implementing bodies		Creative Europe beneficiaries and participants	
		Quantitative	Comment	Quantitative	Comment	Quantitative	Comment
I. COSTS							
Culture strand Budget	Type: One-off and recurrent			Financial envelope for the programming period 2021-2027 (all under direct management): EUR 2,271 billion (31% for the Culture strand)			

				Actual spending for the programming period 2021-2023 (all under direct management): EUR 357 571 909 million			
Administrative costs of implementing Creative Europe – Culture strand	Type: recurrent			Administrative line (executed commitments 2021-2023): EAC: EUR 5,006,408 million CNECT: EACEA: EUR 46 346 756 million	EACEAC FTEs for Culture: ¹⁴² 43 in 2021 45 in 2022 47 in 2023		
Costs for Creative Europe applicants and beneficiaries	Type: recurrent	Not possible to quantify	Administrative costs linked to the application process and meeting the eligibility requirements. These include Length of the application and grant process, financial capacity checks.			Minimum co-financing: 20% for small-scale cooperation projects, 30% for medium-scale cooperation projects, 40% for large scale cooperation projects, 20% for European networks of cultural organisations, 20% for European platforms of emerging artists, 40% for Circulation of literary works projects	Administrative costs related to the application, implementation and reporting requirements. These include Length of the application and grant process, financial capacity checks, budget and payment justifications, grant management reporting (for the beneficiaries) Projects beneficiaries must complement the project budget with

¹⁴² According to EACEA's Specific financial statements

						Average co-financing rate: 23% [<i>source: supporting study</i>]	sources of co-financing other than the EU grant, which vary depending on the action.
II. BENEFITS							
Direct benefits	Type: recurrent	Contribution to policy priorities set under EU Work Plans for Culture (2019-2022; 2023-2026), The New European Agenda for Culture 2018, the 2016 Joint Commission/High Representative Communication “Towards and EU strategy for international cultural relations” 372 projects supported over 2021-2023 that involve third country organisations 247 projects contributing to the European Green	Contribution to policy priorities set under EU Work Plans for Culture (2019-2022; 2023-2026), The New European Agenda for Culture 2018, the 2016 Joint Commission/High Representative Communication “Towards and EU strategy for international cultural relations” and the 2014 Commission Communication “Towards an integrated approach to cultural Heritage for Europe”. Contribution to priorities set by the European Commission for			431 cultural cooperation projects 2 500 organisations from the sector involved in transnational projects Circulation of European literary works: 136 supported projects, 1,500 books translated from 1,200 authors, 1,000 translators supported Music Moves Europe: 51 projects in receipt of a grant Culture Moves Europe: 7,274 individuals participating in mobility projects Out of which 6,266 individually or as a group, and 1,008 via Culture Moves Europe supported	Increased capacity of organisations: common benefits include enhanced internationalisation, experience in transnational and international cooperation, strengthen their capacities, produce innovative approaches, exchange good practices, expanded networks, etc. Stronger international networks within the CCS leading to long term collaboration and a more competitive sector working together Increased cross-border mobility and transnational circulation of artists,

		Deal (EUR 130 ml grant)	the 2019-2024 period: A European Green Deal, A Europe fit for the digital age, An economy that works for people, A stronger Europe in the world, Promoting a European way of life, A new push for democracy.			residencies, 162,678 mobility days, 72% of beneficiaries engaging in new co-productions or co-creations due to their mobility. 85% of beneficiaries developing new outlets, distributors, exhibitors, or audiences as a direct result of their mobility.	professionals and works
		183 funded projects addressing the priority “a Europe fit for the digital age” (EUR 92 ml grant)					Collaboration leading to an increase in the creation, circulation and visibility of cultural works
		431 cultural cooperation projects					Improved international experiences for the careers of artists and professions
		2 500 organisations from the sector involved in transnational projects	Contribution to large scale policy progresses at EU and national levels, supporting the sectors’ needs and supporting more cohesive policy approaches across Member States			99% of Culture Moves Europe beneficiaries acquired some new skills, knowledge or competences during the mobility, (the most frequently the skills related to networking and enhancing positive interactions with people from different backgrounds, developing technical/artistic and creative skills directly connected to participants’ occupation, improving self-empowerment and	Increased contracts and job prospects of supported individuals
		Circulation of European literary works: 136 supported projects, 1,500 books translated from 1 200 authors					Stronger skills, competencies and know-how within the cultural and creative sector
		4 Pan-European Cultural entities supported	Contribution to gender equality and inclusion priorities				Stronger and more cohesive sector networks found in the EU’s cultural and creative sector
		36 Cultural networks supported representing 4,000 members	Contribution to Creating a European network of cultural actors, building a sense of				Through Music Moves Europe: A more diverse and vibrant music sector in the EU, supported
		16 cultural platforms supported					

		[source: supporting study] SDGs 3-4-5-8-10-11-12-16-17 [source: PPS]	European identity and awareness of EU values across participating countries Increase in collaboration across the EU's CCS to stimulate the creation, circulation and visibility of cultural works Increase in audiences for organisations involved in cross-border collaboration Stronger transnational circulation and diversity of European literary works. Promotion of translated works of fiction written in lesser-used languages increasing circulation to larger markets in		self-esteem and teamwork/cooperating in a multicultural team) 4 Pan-European cultural entities (orchestras with artists from at least 20 countries) funded, providing support, professionalisation and performance opportunities for young artists with high potential. 600 young musicians receiving training. 37 Cultural networks supported representing 4,000 members 16 cultural platforms supported, with 316 member organisations coming from 38 countries and 3,200 emerging artists promoted during the period 2021-2023. [source: supporting study]	artists having more opportunity in foreign markets, Music sector adapting to digitization.
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			Europe and beyond. Increase in circulation and readership of literature Increase in readership of EU produced literature Increased cross-border mobility and transnational circulation of artists, professionals and works Stronger and more cohesive sector networks found in the EU's cultural and creative sector. Networks providing with more targeted actions around the policy objectives and with more structured dialogue with the sector. Stronger skills, competencies and know-how within				
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			the cultural and creative sector Through Music Moves Europe: A more diverse and vibrant music sector in the EU, supported artists having more opportunity in foreign markets, Music sector adapting to digitization.				
Indirect benefits	Type: recurrent	Not possible to quantify	Multiplier effect: participating organisations raise capacity in other organisations (through network-building, knowledge exchange, capacity-building).				Multiplier effect: participating organisations raise capacity in other organisations (through network-building, knowledge exchange, capacity-building).

TABLE 3: Simplification and burden reduction (savings already achieved)¹⁴³

	Citizens/Applicants/EU society	EU Public Administration &	Creative Europe beneficiaries and participants
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¹⁴³ For document simplification purposes, this tables includes information for all Creative Europe Strands (MEDIA, Culture and Cross-Sectoral)

			Implementing bodies			
	Quantitative	Comment	Quantitative	Comment	Quantitative	Comment
Culture: Burden reduction following the introduction of simplification measures: lump sums						
The introduction of lump sums aimed to shift focus from reimbursing expenses to reimbursing the achievement of outputs and deliverables.						
Type: recurrent				Reduced administrative burden, reducing overheads and facilitating productivity gains	This participated in a reduction in the average time to grant (TTG) for beneficiaries. The average time to grant for Culture has reduced from 300 days in the first year of the new system (2021) to 238 days in 2023, which is nearly 30 days shorter than the average time under the previous Programme. [source: supporting study]	
Culture: Burden reduction following the introduction of simplification measures: introduction of Multi Annual Financing (MAF)						
Introduction of Multi Annual Financing (MAF) arrangements in place of Framework Partnership agreements to reduce the volume of applications for multi-year projects. MAF was introduced for Networks (NET), Platforms (PLAT) and Creative Europe Desks.						
Type: recurrent				Positive effect in reducing the administrative burden born by EAC/EACEA – smaller number of grant calls, proposal evaluations, and grant agreements to	This participated in a reduction in the average time to grant (TTG) for beneficiaries. Previously for a 3-year Framework Partnership Agreement (FPA), the	

				be established, managed or monitored. Productivity gains.	beneficiaries would have to make 3 applications and submit 3 reports. Since the introduction of multiannual commitments, each beneficiary now makes 1 application for a 3-year project and submits 3 reports, significantly reducing the number of applications and the associated volume of time spent on processing. [source: supporting study]	
Culture: Burden reduction following the introduction of simplification measures: introduction of cascading grants. It reduced the number of organisations that needed to contract to support activities. It has enabled much larger grants to be used, to be distributed for a much higher number of projects, operating in much more specific segments of activity.						
				Positive effect in reducing the administrative burden borne by EAC/EACEA – smaller number of grant calls, proposal evaluations, and grant agreements to be established, managed or monitored. Productivity gains	Participated in providing both larger grants on average and longer grants on average. The average amount awarded per grant across the whole Culture strand was EUR 430 476, which was considerably higher than the strand's average grant amount of EUR 279 466 under the	

					Creative Europe 1 Programme. At the same time the duration of projects and associated grants has increased from an average of 22.7 months under Creative Europe 1 to 28.8 months under Creative Europe 2. Also participated in an improvement in accessibility to the Programme when measured by numbers of project partners. Data suggests that there was a significant increase in the number of unique organisations supported by the Programme as the average number per year is 746 under the 2021-27 Programme compared to 508 under the 2014-2020 Programme. <i>[source: supporting study]</i>	
Culture: Increased accessibility following the introduction of simplification measures: higher co-financing rates						

With the 2021-2027 iteration of the Programme were introduced higher co-financing rates. This reduced the necessary minimum co-financing required from beneficiaries: 20% for small-scale cooperation projects, 30% for medium-scale cooperation projects, 40% for large scale cooperation projects, 20% for European networks of cultural organisations, 20% for European platforms of emerging artists, 40% for Circulation of literary works projects.

					This participated in an improvement in accessibility to the Programme when measured by numbers of project partners. Data suggests that there was a significant increase in the number of unique organisations supported by the Programme as the average number per year is 746 under the 2021-27 Programme compared to 508 under the 2014-2020 Programme. [source: supporting study]	
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Culture: Increased accessibility and burden reduction following the introduction of simplification measures: simplification of financial capacity verification

Financial capacity checks are now only required for coordinators of projects.

					This participated in an improvement in accessibility to the Programme when measured by numbers of project partners. Data suggests that there was a significant increase in the	
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					number of unique organisations supported by the Programme as the average number per year is 746 under the 2021-27 Programme compared to 508 under the 2014-2020 Programme. Under the current Programme, the administrative burden associated with taking part in the Culture strand had decreased by 16 percentage points (to 60%). The administrative burden was perceived as high or very high by 77% of respondents who took part in the predecessor Culture sub-Programme. <i>[source: supporting study]</i>	
Culture: Increased accessibility and burden reduction following the introduction of simplification measures: capping the number of applications an organisation can participate in the European Cooperation projects call. Such a simplification measure has been introduced in the Creative Europe Annual Work Programme 2025. Consequently, full results will come at a later stage.						
				Limit oversubscription. Positive effect in reducing the		Encourage a better turnover and enable new organisations to

				administrative burden borne by EACEA. Productivity gains		receive support from the Programme hence providing a wider support to the cultural and creative sectors
Culture: Increased accessibility and burden reduction following the introduction of simplification measures: Include the large-scale projects category in the European Cooperation projects calls only every two years. Such a simplification measure has been introduced in the Creative Europe Annual Work Programme 2024. Consequently, full results will come at a later stage.						
				Limit oversubscription. Positive effect in reducing the administrative burden borne by EACEA. Productivity gains		Encourage a better turnover and enable new organisations to receive support from the Programme hence providing a wider support to the cultural and creative sectors
MEDIA: Burden reduction following the introduction of simplification measures: lump sums The introduction of lump sums aimed to shift focus from reimbursing expenses to reimbursing the achievement of outputs and deliverables. The use of lump sums has been introduced covering approximately 50% of MEDIA support.						
Recurrent				Reduced administrative burden, reducing overheads and facilitating productivity gains		This participated in a reduction in the average time to grant (TTG) for beneficiaries
MEDIA: Burden reduction following the introduction of simplification measures: streamlining of distribution schemes						
			Distribution Automatic scheme was streamlined to consolidate small grants, and the number	Reduced administrative burden, reducing overheads and	Participated in reduction of number of grants to 806 in 2020 in comparison to 1475 in 2014, a 46%	

			of grant contracts fell from over 1,000 to approximately 300 annually. Distribution Selective scheme consolidation of grants from on average 206 grants in 2014 to an average of 21 grants in 2020, for a similar level of support.	facilitating productivity gains	decrease. Also, an increased grant size, from EUR 53,000 in 2014 to EUR 165,000 in 2020.	
<i>MEDIA: Burden reduction following the introduction of simplification measures: consolidation of MEDIA distribution actions.</i> Consolidation of changes made to the MEDIA distribution schemes during Creative Europe 1, including use of cascading grants to reduce the number of organisations that need to contract to support activities and whilst enabling a more strategic approach granting and projects.						
Recurrent				Positive effect in reducing the administrative burden borne by CNECT/EACEA – smaller number of grant calls, proposal evaluations, and grant agreements to be established, managed or monitored.	2019 simplifications contributed to a 46% decrease in the number of individual contracts required to deliver the same overall level of support. The Distribution Automatic reduced the number of contracts from over 1,000 to approximately 300 annually. Distribution Selective action, the number of	

					individual grants was reduced from on average 206 grants to support on average 26.4 films per year between 2014 to 2018, to an average of 21 grants to support 21 films per year for 2019 and 2020. Continued as the revised Films on the Move action. [source: supporting study]	
MEDIA: Burden reduction following simplification measures: consolidation of MEDIA development schemes and film festivals action Reduction in the number of Development schemes and increased use of slate development to increase the number of support development titles, without an associated increase in grants. Increased length of grants for film festivals action, which now alternates with the film festivals action. Introduction of lump sum grants for Content and film festivals actions to shift focus from reimbursing expenses to reimbursing achievements of outputs and deliverables.						
Recurrent				Positive effect in reducing the administrative burden borne by CNECT/EACEA – smaller number of grant calls, proposal evaluations, and grant agreements to be established, managed or monitored.	A 24% increase in the number of development titles supported per year alongside a 18% decrease in the number of grants per year (all content actions), with an associated increase in average grant size. Increase in average size and length of grant for Film	

					Festivals to EUR 103,059 for a period of two years in comparison to an average of EUR 45,397 for one year under the previous Programme. [source: supporting study]	
MEDIA: Burden reduction following simplification measures: eligibility criteria for MEDIA actions. Consolidation of eligibility criteria that was commenced during CE 1 to ensure clarity for applications, chances of success, and the overall quality of proposals.						
Recurrent				Positive effect in reducing the administrative burden borne by CNECT/EACEA – relatively smaller number of higher quality proposals to be evaluated.	Contributed to a 20pp increase in the average score of successful proposals to 84%, continuing the trend since 2019. [source: supporting study]	
MEDIA: Increased accessibility: design of MEDIA schemes and higher co-financing rates. Introduction of higher co-financing rates and introduction of schemes targeted at lower capacity countries including mini-slate development and evaluation criteria of other content and business cluster and audience actions has contributed to increased accessibility of the Programme for beneficiaries from lower capacity countries.						
Recurrent				Positive contribution to supporting level playing field objectives.	Overall co-financing rate for the MEDIA has increased by 30pp to 58%. Increase in per capita funding for LCC	

					countries under the current Programme of 54%, in comparison to 34% for HCC countries. Increase in the share of support for titles that involve collaboration between high and low-capacity countries. <i>[source: supporting study]</i>	
OVERALL PROGRAMME: Increased accessibility and burden reduction following the introduction of simplification measures: introduction of the eGrant system Creative Europe 2021-2027 introduced a paperless application management system. It aims to harmonise and standardise the administrative procedures of grant management in a fully electronic environment.						
				Reduced administrative burden, reducing overheads and facilitating productivity gains.	Draft evidence suggests that the eGrant system has increased the efficiency of application process under the current (2021-2027) Creative Europe Programme for a large share of Programme beneficiaries. Two fifths of respondents (40%) indicated that the eGrant system made it easier/less time consuming to apply for project	

					funding compared to the previous Programme, while one fifth (20%) found that the eGrant system made it more difficult/time consuming to apply for funding, while around one in seven respondents (14%) did not notice any developments or changes between the two Programmes in this area. [source: supporting study]	
TABLE 4: PART II: II Potential simplification and burden reduction (savings)¹⁴⁴						
	Citizens/Applicants/EU society		EU Public Administration & Implementing bodies		Creative Europe beneficiaries and participants	
	Quantitative	Comment	Quantitative	Comment	Quantitative	Comment
<i>Burden reduction following the introduction of simplification measures: More systematic implementation of the key priority actions as multiannual ones, and by making use of annual instalments in line with the conditions and limits set in the legal base (in recital (37) and Art.8.8 of the Creative Europe Programme Regulation 2021/818).</i>						
Type: recurrent				Positive effect in reducing the administrative burden born by EC/EACEA -		Enabling to earmark a more significant budget for such key activities and potentially attract a

¹⁴⁴ For document simplification purposes, this tables includes information for all Creative Europe Strands (MEDIA, Culture and Cross-Sectoral)

				smaller number of grant calls, proposal evaluations and grant agreements to be established, managed, monitored.		larger pool of potential beneficiaries
<i>Burden reduction following the introduction of simplification measures: use of financing not linked to cost (FNLC) model</i>						
		Incentivising innovation in creative sector		Relieving administrative burden		Faster funding process and relieving administrative burden.
<i>Burden reduction following the introduction of simplification measures: Seeking synergies with other programmes/instruments for amplifying the budgetary resources, e.g. with Digital Europe Programme (that also covers activities related to culture/media: Dataspace for cultural heritage, European Digital Media Observatory (EDMO), etc.) or Erasmus+, especially about the training activities.</i>						
						Faster funding process and relieving administrative burden.
<i>Burden reduction following the introduction of simplification measures: Considering whether there might also be any culture/creative sector activities that could potentially benefit from mobilisation of private funding and MediaInvest type financial instruments.</i>						
						Faster funding process and relieving administrative burden

ANNEX V. STAKEHOLDERS CONSULTATION - SYNOPSIS REPORT

[This annex summarises all stakeholder consultation activities undertaken for the evaluation or fitness check. The content and format of this annex is outlined in Tool #54 (Analysing data and informing policymaking).]

Scoping (Inception phase WPI): A total of 10 **scoping interviews** (WP I) were held to refine the approach and priorities for the evaluations and understanding of the Programme alongside an initial review of key Programme documentation. The results of scoping activities informed the subsequent design of data collection packages and research tools.

The **consultation strategy** targeted the Programme's interested stakeholders, as well as the wider general public through the Open public consultation. Those included key stakeholders for each strand/Sub-programme of the Creative Europe, ensuring an effective representation at EU and national levels and both governmental and non-governmental organisations. The **consultation activities** aimed to gather the views of a broad and representative range of stakeholders and beneficiaries of Creative Europe. Consultation activities included:

- A Call for Evidence which received 21 responses received to the call for evidence (Sub-task 2). The analysis was included in the second Interim Report.
- Stakeholder interviews: 62 all interviews carried out by the evaluator and agreed with DG EAC and DG CNECT. Stakeholders in the following countries were consulted: Austria, Belgium, Czechia, Denmark, France, Germany, Greece, Hungary, Ireland, Italy, Lithuania, the Netherlands, Norway, Poland, Portugal, Slovenia, Spain, Sweden, and the United Kingdom (leaving the EU in 2020).
- A Beneficiary Survey was launched on 16 May 2024 and closed on 11 July 2024 and received 2,504 completed responses from beneficiaries.
- The Creative Europe CCS Guarantee Facility survey was launched on the week commencing 17 June 2024 and was closed on 21 July 2024. The survey received 113 responses.
- An Open Public Consultation (OPC) launched on 31 May and closed on September 2024 received a total of 233 responses from stakeholders.

Call for Evidence

The evaluator has reviewed and analysed the responses received to the call for evidence prepared by the Commission services which was open on the “Have your Say” web portal during the period from 12th May 2023 to 9th June 2023. The Call for Evidence gathered 21 contributions from business associations, non-governmental organisations, academic research institutes, EU citizens, a private company, and others (e.g. independent curators) from across Belgium, France, Sweden, Italy and Portugal.

Stakeholder interviews

During May – October 2024, the evaluator conducted 62 stakeholder interviews with key groups of stakeholders involved in Creative Europe at the European and national/regional levels. The selection of interviewees put forward by the evaluator was designed to balance various perspectives from which the Creative Europe programmes are viewed by ensuring that a variety of different stakeholder groups from different geographies of the EU were consulted (see Table 1).

Evidence from targeted stakeholder interviews helped triangulate evidence from other sources throughout the research, including the desk research, other consultation activities, including stakeholder surveys and Public Consultation, case studies, the overall final analysis, including the counterfactual analysis,

and reporting. To ensure that respondents felt free to express their perspectives, the evaluator chose not to attribute specific viewpoints to individual stakeholders in their reporting.

Beneficiary Survey

The purpose of the beneficiary survey was to collect quantitative and qualitative evidence from individual beneficiaries of the 2014-2020 and 2021-2027 Creative Europe Programmes. The survey gathered data on the impacts and effects of the activities funded under the Creative Europe Programmes, including the emerging impacts of the current 2021-2027 Programme, which served as the basis for comparison with the previous Programme. The survey was also an important tool for collecting evidence to support decisions on the possible successor programme.

Respondents were signposted to different questions based on their answers, including their level of insight on Creative Europe, which strand and action they received funding from, and specific characteristics of their project (such as whether the project was still ongoing, had partner organisations, etc.). Respondents were asked to focus their replies on a single funded project to facilitate project-level analysis. To choose which project to respond on behalf of, respondents were prompted to consider which project was most representative of their experience with the Creative Europe Programme, or to select a completed project in relation to which they have insights on the potential outcomes, results and impacts.

The survey gathered a total of 2,517 complete responses. Most respondents participated in projects funded under the 2021-2027 Creative Europe Programme (72%; n=1820), while the projects of only a quarter of respondents were funded under the predecessor 2014-2020 Programme (28%; n=697). Overall, more than half of responses came from respondents whose project was funded under the *Culture Sub-programme or strand* (56%; n=1411), whereas slightly more than a third of responses were submitted by respondents who participated in a project funded under the *MEDIA Sub-programme or strand* (38%; n=956). Only a minimal share of respondents (6%; n=150) who participated in a project funded under the *Cross-sectoral strand* submitted a response to this survey (see [Figure 1](#)).

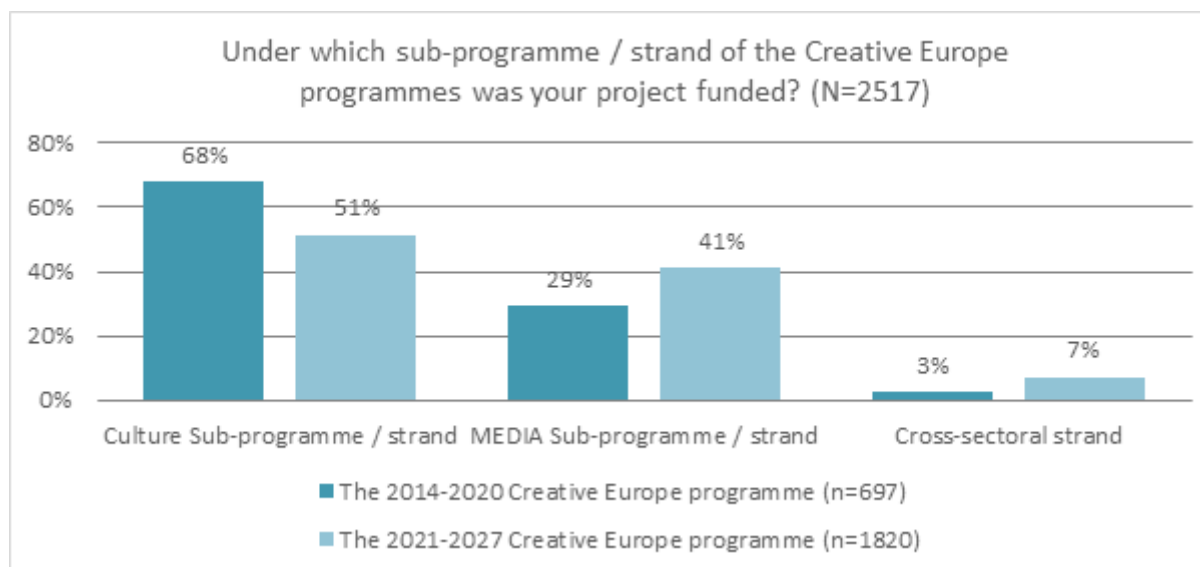


Figure 1. Distribution of responses by Sub-programme or strand. Ecorys evaluation of the Creative Europe 2014-2020 and interim 2021-2027

Open Public Consultation

The Public Consultation (PC) was conducted as part of the Creative Europe 2021-2027 Interim Evaluation and Creative Europe 2014-2020 Final Evaluation (EAC/10/2023) and was available between 31st May 2024 and 06th September 2024.

The aim of the PC was to provide an opportunity for the general public to give their input into the topics covered by the Creative Europe evaluation. The public consultation was open to anyone interested in providing feedback on Creative Europe, extending beyond those directly targeted by other consultation activities such as the stakeholder interviews and the beneficiary survey.

The consultation was available in all official EU languages and was hosted on the EU Survey platform. The survey gathered input primarily through closed multiple-choice questions with opportunities for additional explanation or input through open-text questions. Questions were generally grouped based on the evaluation criteria: effectiveness, relevance, coherence, EU added value, the future of the Creative Europe Programme, and an additional section asking

general information about respondents. Respondents were branched to different questions based on their responses, including the nature of their involvement with the Creative Europe Programme. A total of 233 respondents took part in the PC.

The majority of respondents (85%; 199) to the PC had some knowledge of the Creative Europe Programme, with most respondents being more knowledgeable of the current Creative Europe 2021-2027 Programme (70%; 162). A majority of respondents (39% (90) indicated that they have the most experience with the MEDIA strand, followed by the Culture strand (28%; 66) and the Cross-sectoral strand (3%; 6). Regarding the previous Creative Europe 2014-2020 programming period, 9% (21) of respondents reported having the most experience with the Culture Sub-programme, 6% (13) with the Media Sub-programme, and 1% (3) with the Cross-sectoral strand.

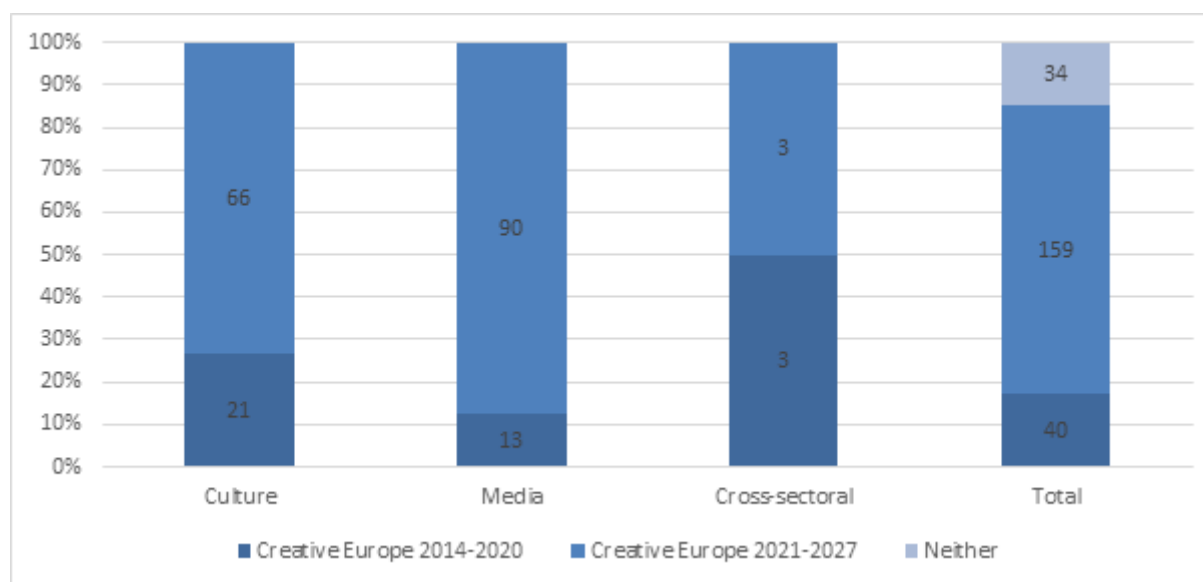


Figure 2. Knowledge of Creative Europe (period and the Sub-programme)

Source: Q: Which editions of the Creative Europe do you have the most experience with? Q: Which Sub-programme / strand of Creative Europe do you have the most experience with?, N=233. Ecorys evaluation of the Creative Europe 2014-2020 and interim 2021-2027

Most of the respondents to the public consultation were Creative Europe funded beneficiaries (41%; 95) or worked with the organisations that received the funding (15%; 35). Other respondents have “an interest in European cultural and creative works but have no direct link to Creative Europe” (16%; 38), “work/have worked with

Creative Europe at a policy level” (7%; 17) or “*applied and did not receive co-funding under Creative Europe*” (9%; 21). Other respondents indicated their experience with Creative Europe either through a recent application, participation in the activities funded by the Programme or representing interest groups ensuring that EU funding projects take into account the needs of their members (9%; 22).

Summary of results:

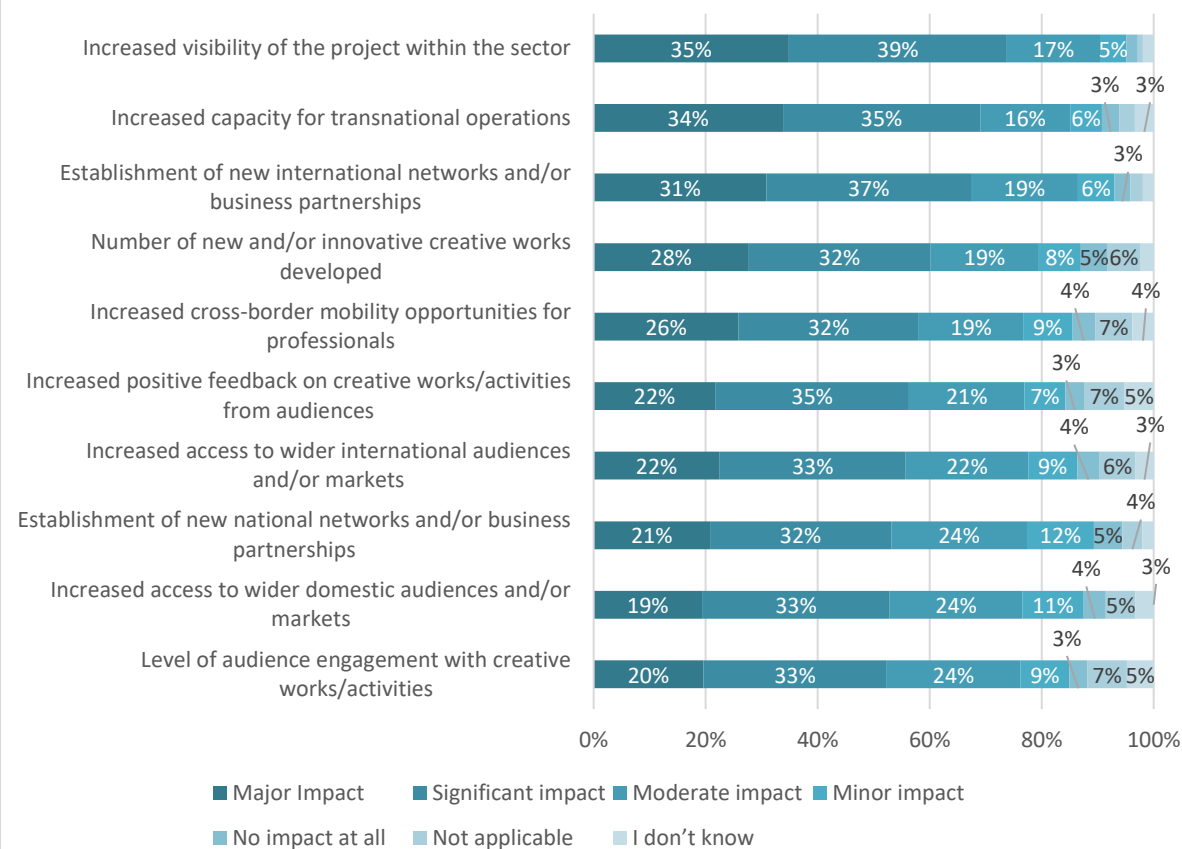
Effectiveness

Outputs, results and impacts

Overall, the majority of stakeholders across consultation activities have indicated that the Creative Europe 2014-2020 and Creative Europe 2021-2027 Programmes have largely delivered on their objectives, and have been effective in strengthening the European audiovisual, cultural and creative industries. Stakeholders that responded to the call for evidence, as well as the majority of those consulted in the stakeholder interviews, expressed a general appreciation for the Programme, particularly as the only source of funding designed specifically for Europe’s audiovisual, cultural and creative sectors. Respondents to the beneficiary survey and the open public consultation (OPC) assessed the Programme as being particularly effective in facilitating transnational collaboration and the cross-border circulation of European audiovisual, cultural and creative works. As shown in Figure 1 below, respondents to the beneficiary survey reported the strongest impact on their organisation in terms of the visibility of their project in the sector, capacity for transnational operations, and the establishment of new international networks or partnerships.

Figure 1. Beneficiary survey responses on the impact Creative Europe funding had on their organisation

To what extent has the programme funding affected your organisation in terms of ... (N=2517)



Source: Beneficiary survey

Regarding the **Creative Europe 2014-2020 Programme** specifically, the majority of respondents to both the beneficiary survey and OPC considered the programme to be very or somewhat effective across each of its objectives. Support for the capacity of European cultural and creative sectors to operate transnationally and internationally¹⁴⁵, promotion of transnational circulation of cultural and creative works¹⁴⁶, and safeguarding and promoting Europe's cultural heritage and cultural diversity¹⁴⁷ were considered to be amongst the top three most effective objectives of the Programme by respondents from both the beneficiary survey and the OPC. While responses were positive overall, a significant portion of respondents (ranging between 33-52%) indicated that there is still room to make the Programme more effective. The objectives with the lowest effectiveness ratings included strengthening the financial capacity of SMEs in the cultural and creative sectors¹⁴⁸ and fostering policy development, innovation, creativity, audience development and new business and management models¹⁴⁹.

Figure 2 below shows the responses to the beneficiary survey across all ten objectives.

Figure 2. Beneficiary survey responses on the effectiveness of the Creative Europe 2014-2020 Programme in achieving its objectives

¹⁴⁵ 92% (n=466) of respondents from the beneficiary survey and 82% (n=23) of respondents from the OPC indicated that the Programme was very or somewhat effective in supporting the capacity of the European cultural and creative sectors to operate transnationally and internationally.

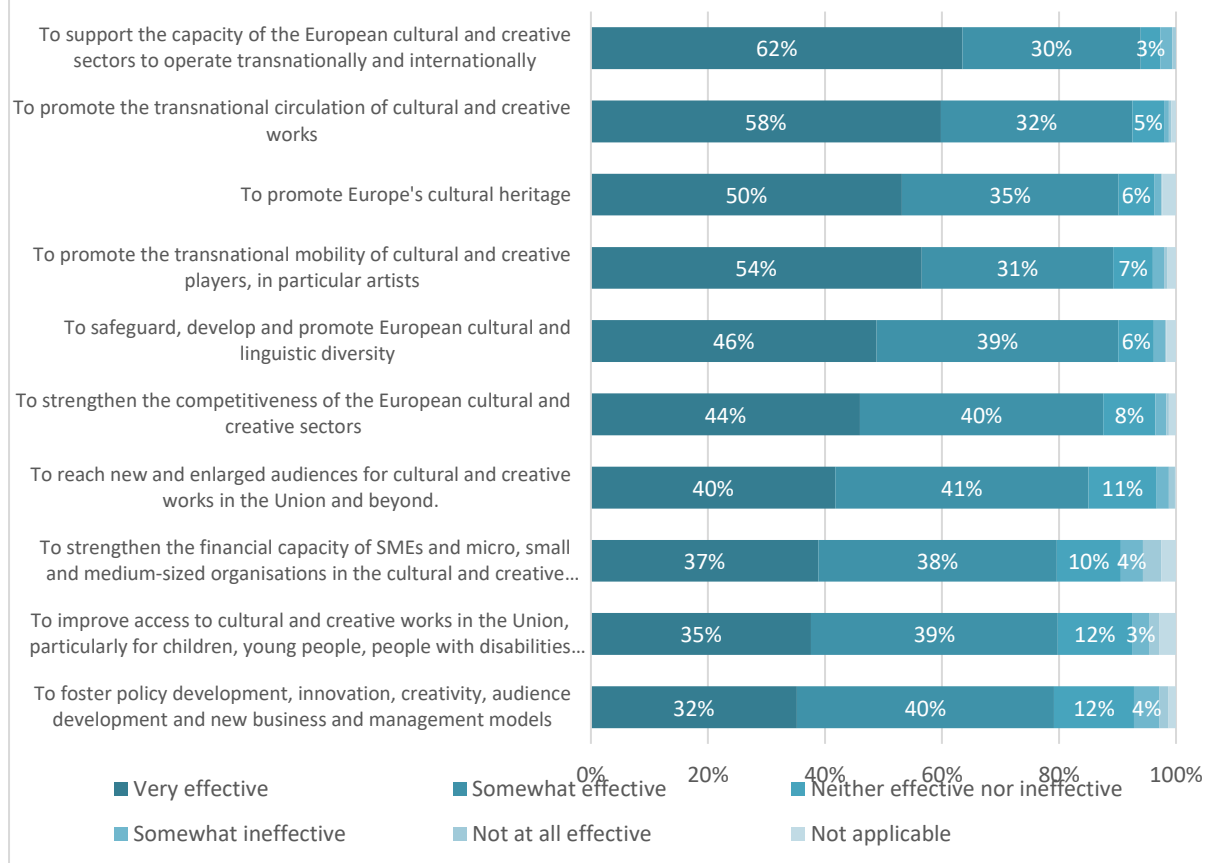
¹⁴⁶ 91% (n=458) of respondents from the beneficiary survey and 89% (n=25) of respondents from the OPC indicated that the Programme was very or somewhat effective in promoting the transnational circulation of cultural and creative works.

¹⁴⁷ 85% (n=431) of respondents to the beneficiary survey and 89% (n=25) of respondents from the OPC indicated that the Programme was very or somewhat effective in promoting Europe's cultural heritage.

¹⁴⁸ 17% (n=85) of respondents to the beneficiary survey and 32% (n=9) of respondents from the OPC indicated that the Programme was neither effective nor ineffective, somewhat ineffective, or not at all effective in strengthening the financial capacity of SMEs and micro, small and medium-sized organisations in the cultural and creative sectors.

¹⁴⁹ 18% (n=90) of respondents to the beneficiary survey and 21% (n=6) of respondents to the OPC indicated that the Programme was neither effective nor ineffective, somewhat ineffective, or not at all effective in fostering policy development, innovation, creativity, audience development and new business and management models.

Thinking about the overall 2014-2020 Creative Europe Programme, to what extent would you say it has been effective in reaching its objectives? (N=506)



Source: Beneficiary survey

The majority of respondents to the beneficiary survey (78%; n=546) indicated achieving all the results planned for their projects. Over 3,500 full-time equivalents (FTEs) were reported to have been created through projects that received Creative Europe 2014-2020 funding, with the majority of these being temporary FTEs. Respondents also reported 4,310 employees being trained or upskilled, with a higher number trained in digital skills (4,699) than green skills (1,609). An average of 8 transnational partnerships were reported to have been created by survey respondents due to Creative Europe 2014-2020 funding, with a total of 3,544 partnerships reported. Across each of the indicators measured in the survey, the average value is higher than the median value, indicating that there is a positive skew in the data with the majority of respondents reporting lower values and few respondents reporting very high values.

Table 1 presents the overview on the indicators reported by respondents funded under Creative Europe 2014-2020.

Table 1. Beneficiary survey responses to indicators measuring the impact of Creative Europe 2014-2020 funding on their organisation

Indicator	Total	Average	Median	n
Number of permanent FTEs created	520	2.06	2	253
Number of temporary FTEs created	3,032	8.94	3	339
Number of employees that benefitted from training and learning events	2,781	7.83	4	355
Number of employees trained or upskilled	4,310	11.59	4	372
Number of employees trained or upskilled in digital skills	4,699	18.36	3	256
Number of employees trained or upskilled in green skills	1,609	8.70	3	185
Average annual turnover of organisations (EUR)	4,803,216,33	37,820,601	200,000	127

Indicator	Total	Average	Median	n
Number of transnational partnerships created by organisations	3,544	8.17	5	434

Source: Beneficiary survey

The majority of respondents to the beneficiary survey and OPC funded under the **Creative Europe 2021-2027 Programme** also found the Programme to be very or somewhat effective across all objectives; however, there was a higher proportion of respondents indicating that they did not know, or that the objective was not applicable to them. Respondents to the beneficiary survey and the OPC both rated the objectives of enhancing artistic and cultural cooperation at the European level to support the creation of European works¹⁵⁰ and safeguarding, developing and promoting European cultural and linguistic diversity¹⁵¹ as the two most effective objectives of the Programme. On the other hand, the objectives that were considered least effective by respondents to the beneficiary survey and OPC were increasing the competitiveness and the economic potential of the cultural and creative sectors¹⁵² and promoting policy cooperation and innovative actions supporting all strands of the Programme¹⁵³.

The full results for the beneficiary survey are shown in Figure 3 below.

Figure 3. Beneficiary survey responses on the effectiveness of the Creative Europe 2021-2027 Programme in achieving its objectives

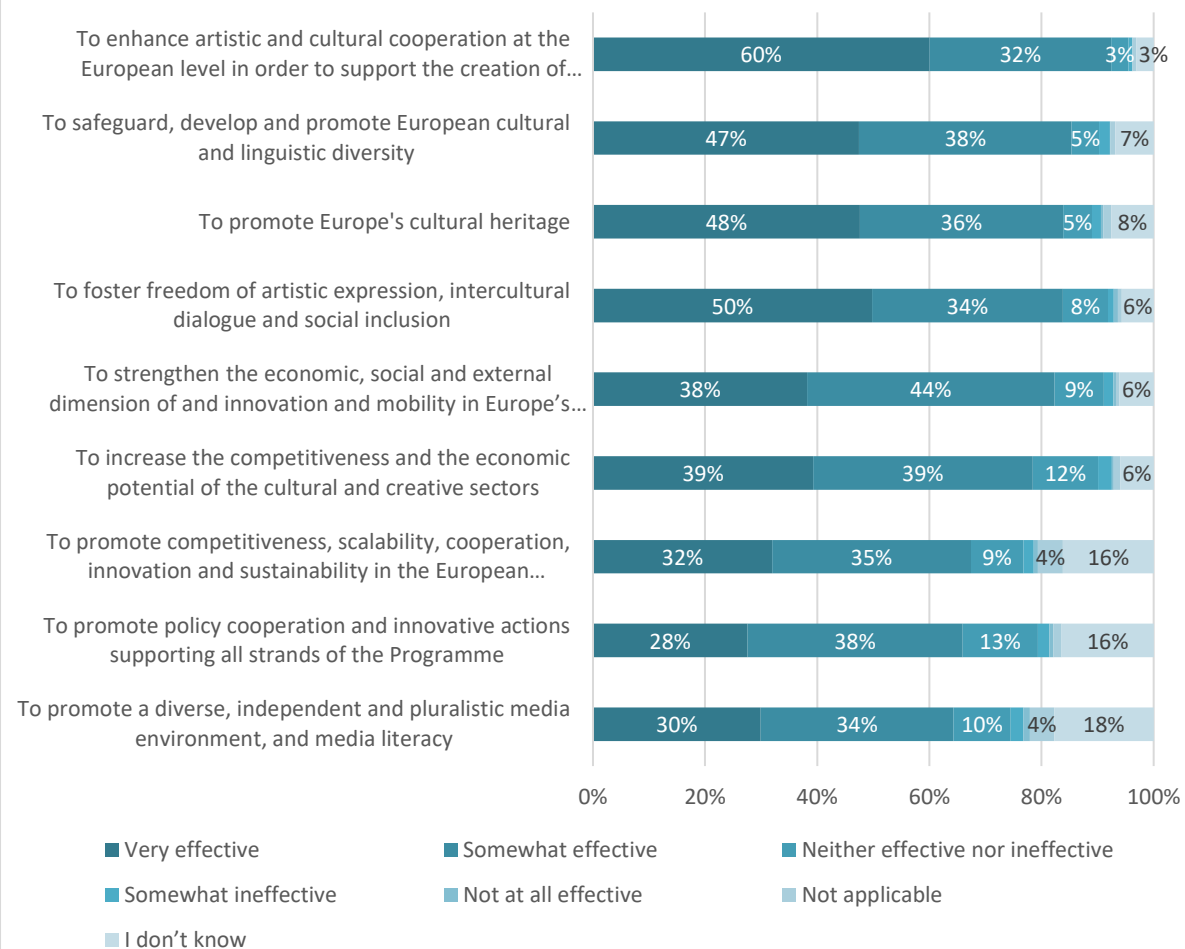
¹⁵⁰ 92% (n=1,301) of respondents to the beneficiary survey and 83% (n=134) of respondents to the OPC indicated that the Programme was very or somewhat effective in enhancing artistic and cultural cooperation at the European level in order to support the creation of European works.

¹⁵¹ 85% (n=1,202) of respondents to the beneficiary survey and 78% (n=127) of respondents to the OPC indicated that the Programme was very or somewhat effective in safeguarding, developing and promoting European cultural and linguistic diversity.

¹⁵² 14% (n=204) of respondents to the beneficiary survey and 14% (n=22) respondents to the OPC indicated that the Programme was neither effective nor ineffective, somewhat ineffective, or not at all effective in increasing the competitiveness and the economic potential of the cultural and creative sectors.

¹⁵³ 16% (n=228) of respondents to the beneficiary survey and 15% (n=24) respondents to the OPC indicated that the Programme was neither effective nor ineffective, somewhat ineffective, or not at all effective in promoting policy cooperation and innovative actions supporting all strands of the Programme.

Thinking about the overall 2021-2027 Creative Europe Programme, to what extent would you say it has been effective in reaching its objectives? (N=1408)



Source: Beneficiary survey

Although many of the projects were still underway, 63% (n=1,145) of respondents to the beneficiary survey funded under the current Programme reported achieving all planned results for their projects. On the general indicators reported by respondents, a total of 8,688 FTEs were reported to have been created, with the majority (6,212) being temporary. Nearly 11,000 employees were reported to have been trained or upskilled, with the majority trained in digital skills (9,608) compared with green skills (5,904). An average of 10 transnational partnerships were reported to have been created by respondents' organisations through their projects funded by Creative Europe 2021-2027, with a total of 11,712 partnerships reported. As described above, there is a positive skew in the data, shown through the difference between the average and median values, indicating the majority of respondents reported lower values, with a smaller number of organisations reporting high or very high values. Table 2 below shows the full overview of each indicator. Note that while the total sums across all indicators are higher under Creative Europe 2021-2027, this is due to there being a larger sample size amongst beneficiaries under the current Programme. Table 2. Beneficiary survey responses to indicators measuring the impact of Creative Europe 2021-2027 funding on their organisations

Indicator	Total	Average	Median	n
Number of permanent FTEs created	2,476	3.27	2	757
Number of temporary FTEs created	6,212	6.62	2	939
Number of employees that benefitted from training and learning events	12,330	12.87	4	958
Number of employees trained or upskilled	10,989	10.66	3	1,031
Number of employees trained or upskilled in digital skills	9,608	13.61	3	706
Number of employees trained or upskilled in green skills	5,904	8.12	3	727

Indicator	Total	Average	Median	n
Average annual turnover of organisations	464,996,965	1,288,020	200,000	361
Number of transnational partnerships created by organisations	11,712	9.93	5	1,179

Source: Beneficiary survey

When **comparing the two Programmes**, there are a few notable differences. There is some evidence from the consultation activities to suggest the Creative Europe 2021-2027 Programme has been more effective in supporting the economic growth of businesses in comparison with the previous Programme. When asked about the impact of the Programme on their organisation, there was a 12-percentage-point increase in respondents indicating a major or significant impact on increased sustainable business / organisational growth under the current Programme, and an 11 percentage point increase under the current Programme in the respondents indicating an impact on longer-term business resilience. Further, for the general indicator on the annual turnover of organisations, the positive skew of data is much lower under the current Programme, suggesting that it may fund a higher share of SMEs than the previous Programme. However, the indicators also suggest that more employees were trained or upskilled under the previous Programme¹⁵⁴.

The majority of consulted stakeholders funded under **Culture Sub-programme/strand** expressed the importance of the Programme for their organisation, particularly in relation to facilitating cross-border cooperation, supporting capacity-building within the cultural and creative sectors, and promoting cultural diversity. The respondents to both the OPC and the beneficiary survey included the contribution towards cross-border cooperation in order to support the creation, circulation and visibility of European creative works as one of the strongest areas of the Programme¹⁵⁵, which was also supported by the key messages received from those consulted through the stakeholder interviews¹⁵⁶. Respondents to the beneficiary survey reported a total of 10,594 cultural and creative works being developed, produced or distributed under the 2014-2020 Culture Sub-programme, with 13,631 under the 2021-2027 Culture strand.

¹⁵⁴ The average and median values are higher under Creative Europe 2014-2020 for the following three indicators: Number of employees trained or upskilled, Number of employees trained or upskilled in digital skills, and Number of employees trained or upskilled in green skills.

¹⁵⁵ 96% (n=896) of respondents to the beneficiary survey and 88% (n=55) of respondents to the OPC assessed the Culture Sub-programme/strand as somewhat or very effective in strengthening transnational cooperation and the cross-border dimension of the creation, circulation and visibility of European creative works.

¹⁵⁶ This view was expressed by beneficiaries, sectoral organisations, and Creative Europe Desks.

Respondents to the OPC and the beneficiary survey ranked the contribution Creative Europe-funded projects have towards capacity-building in the sectors and increasing their economic competitiveness and innovation¹⁵⁷ highly as well. Several stakeholders interviewed emphasised the impact internationalisation of the sector has had on broadening career prospects of cultural and creative professionals, offering exposure to international markets, and ultimately increasing the economic opportunities available to organisations, particularly those from regions with weaker economic capacities¹⁵⁸. Respondents to the beneficiary survey that received funding from the Culture Sub-programme strand reported a total of 4,074 individuals under the previous Programme and 12,959 individuals under the current Programme travelling to another country for work and/or learning opportunities. Respondents that were funded under the 2014-2020 Culture Sub-programme felt they contributed the most to developing new skills and competences out of all other areas, whereas these indicators were ranked third and fourth by respondents funded under the 2021-2027 Culture strand.

Lastly, respondents to the OPC and beneficiary survey also strongly assessed the effectiveness of the Culture Sub-programme/strand in supporting European cultural diversity and heritage and increasing the access to and participation in culture¹⁵⁹. Stakeholders interviewed also stressed the value of the Sub-programme/strand in promoting EU values and cultural diversity¹⁶⁰. Cultural and creative works developed under the 2014-2020 Sub-programme were reported by survey respondents to have reached over 4 million people at national level and 7 million people at international level, while works funded under the 2021-2027 strand were reported to have reached 9 million people at national level and 34 million people at international level. However, there is a significant difference between the average and median values on the number of people accessing these works, particularly under the current Programme, indicating that a smaller number of funded projects reach large audiences, while the majority reach more modest audience sizes. Nevertheless, respondents funded under the Culture Sub-programme/strand indicated that the funding had a strong impact on audience engagement and positive feedback from audiences, particularly when compared with the other Sub-programme/strands¹⁶¹.

The Culture Sub-programme/strand had the highest share of respondents from the beneficiary survey reporting achieving all their planned results (71%; n=994) compared to the other Sub-programme/strands, with an additional 29% (n=403) indicating they were partially achieved. Table 3 below shows the

¹⁵⁷ 91% (n=432) of respondents to the beneficiary survey and 77% (n=51) of respondents to the OPC indicated the Culture Sub-programme/strand was somewhat or very effective in strengthening cultural and creative organisations.

¹⁵⁸ This view was expressed by beneficiaries, sectoral organisations, an EU-level policymaker, and Creative Europe Desks.

¹⁵⁹ 92% (n=863) of respondents to the beneficiary survey indicated that the Culture strand is somewhat or very effective in increasing access to and participation in culture across Europe, while 77% (n=51) of respondents to the OPC assessed the Culture Sub-programme/strand as somewhat or very effective in safeguarding, developing and promoting European cultural and linguistic diversity and heritage.

¹⁶⁰ This view was expressed by beneficiaries and sectoral organisations.

¹⁶¹ A higher proportion of respondents from the Culture Sub-programme/strand indicated a major or significant impact on increased positive feedback on creative works/activities from audiences (64%; n=909) and audience engagement with creative works/activities (60%; n=845), compared to their MEDIA (45%; n=431, and 41%; n=396) and Cross-sectoral peers (51%; n=76, and 50%; n=75).

full overview of each indicator from respondents funded under Creative Europe 2014-2020, while Table 4 shows the values reported by respondents funded under Creative Europe 2021-2027.

Table 3. Beneficiary survey responses to indicators measuring the impact of the Creative Europe 2014-2020 Culture Sub-programme funding on their organisation

Indicator	Total	Average	Median	n
Number of professionals from respondent's organisations that travelled to another country for work and/or learning opportunities	4,074	14.00	5	291
Number of cultural and creative works that were developed, produced or distributed	10,594	32.90	9	322
Number of people at national level who accessed cultural and creative works that respondent's organisations were involved in developing, producing or distributing	4,332,507	18,127.64	1,500	239
Number of people at international level who accessed cultural and creative works that respondent's organisations were involved in developing, producing or distributing	7,110,963	36,844.37	1,000	193

Source: Beneficiary survey

Table 4. Beneficiary survey responses to indicators measuring the impact of the Creative Europe 2021-2027 Culture strand funding on their organisation

Indicator	Total	Average	Median	n
Number of professionals from respondent's organisations that travelled to another country for work and/or learning opportunities	12,959	21.74	4	596
Number of cultural and creative works that were developed, produced or distributed	13,631	24.00	6	568
Number of people at national level who accessed cultural and creative works that respondent's organisations were involved in developing, producing or distributing	9,395,161	22,638.94	500	415
Number of people at international level who accessed cultural and creative works that respondent's organisations were involved in developing, producing or distributing	34,076,408	91,850.16	700	371

Source: Beneficiary survey

Under the **MEDIA Sub-programme/strand**, the stakeholders consulted also overwhelmingly expressed the importance of the Creative Europe funding in Europe's audiovisual sectors. In particular, respondents highlighted the contribution of the Programme towards strengthening the competitiveness of the sector, facilitating European-level cooperation on audiovisual works, and supporting the development of culturally significant content. Respondents to the OPC and the beneficiary survey considered the MEDIA Sub-programme/strand's contribution to the economic growth, competitiveness, and capacity of European audiovisual enterprises as one of its strongest contributions¹⁶². Beneficiaries consulted during interviews mentioned Creative Europe support contributing to companies raising their visibility, particularly given that many view the MEDIA label as a sign of quality. In addition, funding contributed to strengthening their reputation, and increasing their human resources available for creative development. Respondents to the beneficiary survey that

¹⁶² 76% (n=156) of respondents to the beneficiary survey funded under Creative Europe 2014-2020, 84% (n=624) of respondents to the beneficiary survey funded under Creative Europe 2021-2027, and 82% (n=71) of respondents to the OPC indicated that the MEDIA Sub-programme/strand was somewhat or very effective in increasing the competitiveness and the economic potential of the cultural and creative sectors.

received MEDIA funding indicated that it had a strong impact on their organisation's market position, particularly when compared with the other Sub-programme/strands¹⁶³.

The MEDIA Sub-programme/strand was also assessed as being highly effective in facilitating cooperation on the development, production, distribution and consumption of audiovisual works by respondents to the OPC and beneficiary survey¹⁶⁴. This was considered the strongest area by respondents funded under the 2021-2027 MEDIA strand, and was amongst the top three areas for respondents funded under the 2014-2020 MEDIA Sub-programme and the OPC. Respondents to the beneficiary survey reported a total of 5,489 audiovisual works being developed, produced or distributed under the previous Programme, and 28,408 reported under the current Programme.

Lastly, many stakeholders consulted expressed the value of the MEDIA Sub-programme/strand in supporting cultural diversity by contributing to the development of culturally significant content. Respondents to the OPC considered the promotion of European cultural and linguistic diversity and heritage as the second-strongest area under the MEDIA Sub-programme/strand¹⁶⁵. Beneficiaries that were interviewed also mentioned the value of the slate development and single project development actions in allowing for more diverse stories to be told, particularly from smaller companies. However, a few beneficiaries expressed a concern about the high volume of productions being developed, with only a small percentage reaching large audiences and able to compete with the international competition. This concern is supported by the indicators on the number of individuals accessing audiovisual works supported by Creative Europe reported by survey respondents. There is a significant gap between the average and median values reported by respondents, showing that the large majority of respondents reported more modest audiences being reached, while a select few respondents reported very largely audiences, particularly at international level.

The majority of respondents (63%; n=603) to the beneficiary survey funded under the MEDIA Sub-programme/strand reported achieving all their planned results, with an additional 35% (n=339) indicating they were partially achieved. Table 5Table 3 below shows the full overview of each indicator from respondents funded under Creative Europe 2014-2020, while Table 6 shows the values reported by respondents funded under Creative Europe 2021-2027.

¹⁶³ Participants in the MEDIA Sub-programme/strand more frequently reported a major or significant impact on improved market position and/or financial turnover (55%; n=530) relative to beneficiaries in the Culture (33%; n=459) and Cross-sectoral strands (33%; n=50).

¹⁶⁴ 76% (n=155) of respondents to the beneficiary survey funded under Creative Europe 2014-2020, 88% (n=657) of respondents to the beneficiary survey funded under Creative Europe 2021-2027, and 80% (n=72) of respondents to the OPC indicated that the MEDIA Sub-programme/strand was somewhat or very effective in enhancing artistic and cultural cooperation at the European level in order to support the creation of European audiovisual works.

¹⁶⁵ 81% (n=73) of respondents to the OPC indicated that the MEDIA Sub-programme/strand was very or somewhat effective in safeguarding, developing and promoting European cultural and linguistic diversity and heritage.

Table 5. Beneficiary survey responses to indicators measuring the impact of the Creative Europe 2014-2020 MEDIA Sub-programme funding on their organisation

Indicator	Total	Average	Median	n
Number of audiovisual works reported to be developed, produced or distributed	5,489	51.78	5	106
Number of individuals at national level reported to have accessed audiovisual works developed, produced or distributed	32,257,429	528,810	25,000	61
Number of individuals at international level reported to have accessed audiovisual works developed, produced or distributed	76,475,274	1,365,631	850	56

Source: Beneficiary survey

Table 6. Beneficiary survey responses to indicators measuring the impact of the Creative Europe 2021-2027 MEDIA strand funding on their organisation

Indicator	Total	Average	Median	n
Number of audiovisual works reported to be developed, produced or distributed	28,408	70.67	6	402
Number of individuals at national level reported to have accessed audiovisual works developed, produced or distributed	84,940,243	418,425	4,500	203

Indicator	Total	Average	Median	n
Number of individuals at international level reported to have accessed audiovisual works developed, produced or distributed	197,532,523	1,250,206	600	158

Source: Beneficiary survey

For the **Cross-sectoral strand**, there were noteworthy differences between the two Programmes, as under the previous Programme, the strand was considered most effective in relation to promoting networking, supporting transnational exchange, and increasing access to finance for SMEs, and the least effective in testing new approaches and facilitating policy dialogue¹⁶⁶. However, under the current Programme, the strand was considered highly effective in encouraging innovative approaches and supporting transnational policy dialogue by respondents to the beneficiary survey¹⁶⁷.

Respondents to the beneficiary survey indicated that the Innovation Labs action was most effective in improving the production, financing and circulation of European audiovisual and cultural content in the digital age¹⁶⁸. Survey respondents also found the action to be effective in increasing the visibility, discoverability, availability and diversity of content in the digital age, and improving the overall competitiveness of the European audiovisual, cultural and creative sectors¹⁶⁹. Beneficiaries consulted through interviews expressed this view as well, indicating that the Innovation Labs action helped facilitate

¹⁶⁶ 74% (n=14) of respondents to the beneficiary survey funded under the 2014-2020 Cross-sectoral strand found the strand to be very or somewhat effective in promoting peer-learning activities and networking among cultural and creative organisations and policy-makers, 74% (n=14) found it to be effective in supporting transnational exchange of experiences and know-how in relation to new business and management models, and 68% (n=13) found it to be effective in facilitating access to finance for SMEs and micro, small and medium-sized organisations in the CCS sector.

¹⁶⁷ 81% (n=106) of respondents to the beneficiary survey funded under the 2021-2027 Cross-sectoral strand found the strand to be very or somewhat effective in encouraging innovative approaches to the creation, distribution and promotion of, and access to, content across CCS sectors and other sectors, while 72% (n=94) found it to be effective in supporting cross-sectoral transnational policy cooperation, particularly in the fields of social inclusion and artistic freedom.

¹⁶⁸ 93% (n=25) of respondents to the beneficiary survey funded under the Cross-sectoral strand found the action to be very or somewhat effective in improving the production/financing and circulation of European audiovisual and cultural content in the digital age.

¹⁶⁹ 86% (n=24) of respondents to the beneficiary survey funded under the Cross-sectoral strand found the action to be very or somewhat effective in improving the competitiveness of the European audiovisual and other cultural and creative sectors and increasing the visibility, discoverability, availability and diversity of European audiovisual and cultural content in the digital age.

experimentation, such as the usage of digital and innovative technologies at different stages of the creative process. A total of 40 innovative tools for the cultural, creative and audiovisual sector developed, produced or distributed were reported by survey respondents to have been created through Creative Europe 2014-2020 funding, while 207 were reported under Creative Europe 2021-2027 funding. However, a much lower proportion of respondents found the action to be effective in accelerating the environmental transition of the European audiovisual, cultural and creative sectors, compared with the other objectives¹⁷⁰.

Respondents to the beneficiary survey the Programme to be less effective in meeting the objectives of the News Media action in comparison to other actions and strands. Respondents found the action to be most effective in improving the quality or trustworthiness of news content, as well as enabling knowledge sharing on media literacy and supporting projects that enable knowledge sharing on media literacy¹⁷¹. However, a lower proportion of respondents found the call effective in monitoring media freedom and pluralism in the EU, supporting self-regulation and ethical codes in journalism, and supporting rapid responses to violations of press and media freedom¹⁷². A beneficiary under the News Media action that was interviewed expressed that it was too early to assess the effectiveness of the action, particularly as many projects operate in silos, limiting the potential for more widespread change. However, the interviewee did mention that longer projects and those that focus on capacity building within the sector have had stronger impacts.

The majority of respondents to the beneficiary survey (63%; n=94) funded under the Cross-sectoral strand reported achieving all their planned results, with an additional 37% (n=55) reporting they were partially achieved. Table 7 below shows the full overview of each indicator from respondents funded under Creative Europe 2014-2020, while Table 8Table 6 shows the values reported by respondents funded under Creative Europe 2021-2027.

Table 7. Beneficiary survey responses to indicators measuring the impact of the Creative Europe 2014-2020 Cross-sectoral strand funding on their organisation

¹⁷⁰ 59% (n=16) of respondents to the beneficiary survey funded under the Cross-sectoral strand found the action to be very or somewhat effective in accelerating the environmental transition of the European audiovisual, cultural and other creative sectors

¹⁷¹ 79% (n=22) of these respondents to the beneficiary survey funded under the Cross-sectoral strand found the action to be very or somewhat effective in improving the quality / trustworthiness of news content and the same amount found it to be effective in enabling knowledge sharing on media literacy and supporting projects that enable knowledge sharing on media literacy

¹⁷² 54% (n=15) of respondents to the beneficiary survey funded under the Cross-sectoral strand found the action to be very or somewhat effective in monitoring media freedom and pluralism in the EU, 46% (n=13) found it to be effective in supporting self-regulation and ethical codes in journalism and 46% (n=13) of respondents found it to be effective in supporting a project providing rapid responses to violations of press and media freedom.

Indicator	Total	Average	Median	n
Number of innovative tools for the cultural, creative and audiovisual sector developed, produced or distributed	40	3.64	3	11
Number of transnational exchanges and collaborations respondents' organisations were involved in	126	12.60	3	10

Source: Beneficiary survey

Table 8. Beneficiary survey responses to indicators measuring the impact of the Creative Europe 2021-2027 Cross-sectoral strand funding on their organisation

Indicator	Total	Average	Median	n
Number of innovative tools for the cultural, creative and audiovisual sector developed, produced or distributed	207	3.98	2	52
Number of transnational exchanges and collaborations respondents' organisations were involved in	1,447	17.86	5	81

Source: Beneficiary survey

When **comparing across Sub-programme/strand**, results from the consultation activities suggest that the Culture Sub-programme/strand contributes more to collaboration and engagement with cultural and creative works, while the MEDIA Sub-programme/strand contributes more to the market position of audiovisual companies. This would be largely in line with the main priorities of the Sub-programmes/strands. For example, respondents to the beneficiary survey that received MEDIA funding indicated that the Programme was most effective at strengthening the competitiveness of the sector, and it had the strongest impact on their organisation's annual turnover. Respondents that received Culture funding indicated that the Programme was most effective at facilitating cross-border collaboration and had a stronger impact on audience engagement and audience feedback. For the Cross-sectoral strands,

respondents reported a less straightforward contribution, particularly across funding periods, with some of the areas being mentioned including increasing the training offer, encouraging innovative approaches, and supporting transnational dialogue.

Programme reach

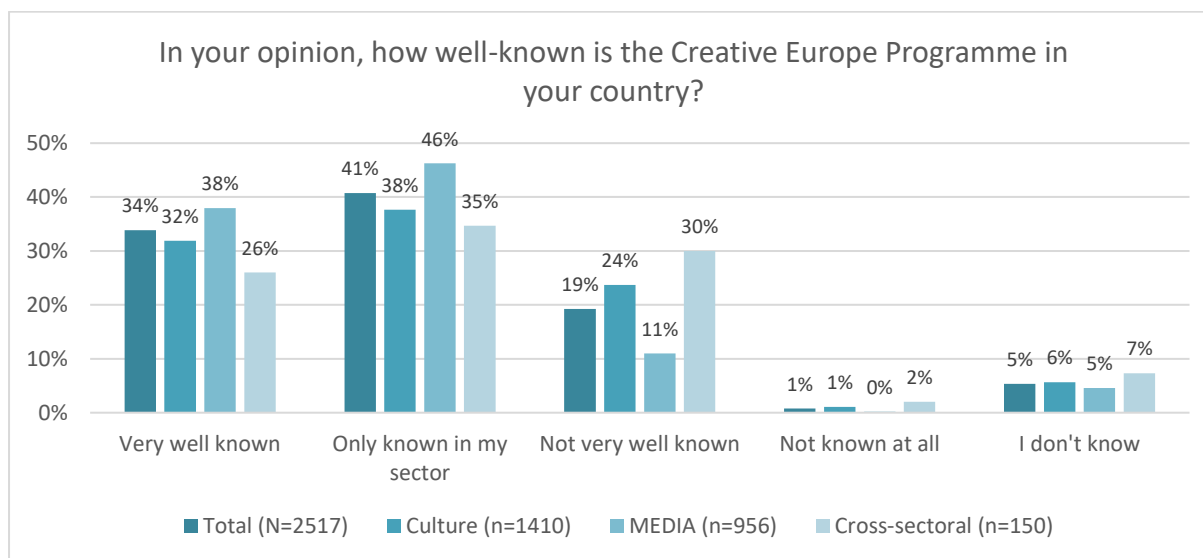
Overall, the majority of individuals consulted for this study indicated there being a strong **awareness of the Creative Europe Programme in their sector**. The majority of respondents to the beneficiary survey and the OPC indicated that the Creative Europe Programme is very well known in their sector¹⁷³. Although the beneficiary survey showed no significant differences across Programmes, the OPC data showed an 18 percentage point increase in reported visibility between the two Programmes. Stakeholders interviewed that received MEDIA funding felt that the Sub-programme/strand adequately reaches its intended target groups, although stakeholders from the video games sector may be less aware of their eligibility for funding. From the Culture Sub-programme/strand, stakeholders mentioned that the visibility varies across sub-sectors, with high levels of awareness in areas such as music and digital arts, but potentially less so in the fashion, visual arts, and design sub-sectors.

Regarding visibility to the general public, the presence or absence of a specific logo was often mentioned by stakeholders as a key factor. MEDIA beneficiaries that were consulted during the interviews often mentioned the MEDIA logo as playing a significant role in highlighting Creative Europe support for audiovisual works. However, MEDIA beneficiaries also mentioned that it is harder to make sure the logo is visible for certain projects, such as in video games or during festivals. At the same time, stakeholders from the Culture Sub-programme/strand mentioned that the general EU funding logo limits the visibility of Creative Europe support for the creative and cultural sectors. This is also seen through the responses to the beneficiary survey, with the respondents from the MEDIA Sub-programme/strand having the highest share of responses indicating the Programme is well known compared to the other Sub-programme/strands, as shown in Figure 4 below. MEDIA beneficiaries that responded to the OPC also had a slightly higher share of respondents indicating the Programme was visible compared to the Culture Sub-programme/strand¹⁷⁴.

Figure 4. Beneficiary survey responses on the public awareness of the Creative Europe Programme, by Sub-programme/strand

¹⁷³ 75% (n=2,020) of respondents to the beneficiary survey and 69% (n=160) of respondents to the OPC indicated that the Creative Europe Programme is very or somewhat visible for citizens, artists and operators in the audiovisual, cultural and creative sectors.

¹⁷⁴ 79% (n=81) of MEDIA beneficiaries, 74% (n=60) of Culture beneficiaries, and 44% (n=4) of Cross-sectoral beneficiaries indicated that the Programme is very or somewhat visible for citizens, artists and operators in the audiovisual, cultural and creative sectors.



Source: Beneficiary survey

When asked how to increase the visibility of the Programme, respondents to the beneficiary survey mentioned national-level information days, workshops and events, and the importance of conducting sector-specific outreach. Overall, dissemination activities of other projects supported by the Creative Europe Programme were considered the most effective in raising awareness about the Programme, followed by activities by Creative Europe Desks, sectoral organisations, and the European Commission. The results suggest this is currently being addressed well, as the majority of respondents to the beneficiary survey indicated that dissemination activities are significant component of their activities, with organisations mainly targeting national or European audiences¹⁷⁵.

Regarding **participation in the Creative Europe Programme**, stakeholders consulted gave a number of reasons for non-participation amongst certain stakeholder types and sub-sectors. For example, interviewees mentioned that the non-participation of certain target groups could be due to the

¹⁷⁵ 62% (n=1,564) of respondents to the beneficiary survey indicated that dissemination is a significant component of their activities, 16% (n=407) indicated that they disseminate, but that it is a smaller component of their activities, and a further 17% (n=431) indicated that they still plan to disseminate their activities in the future.

disproportionate administrative burden and the higher risk of investment for smaller organisations. It was noted that the application process requires significant resources, including human resources and specific knowledge of the application form, as well as previous track records for MEDIA funding, which smaller players often lack¹⁷⁶. Stakeholders also pointed to the low success rates under the Culture Sub-programme/strand, which can disproportionately impact smaller organisations and first-time applicants, as the application process already takes up a larger share of their time and resources compared to larger, more experienced organisations. A similar message was received through the Call for Evidence, with stakeholders there also mentioning the length application process being a deterrent for smaller organisations and those without experience applying for EU funding.

There is evidence that the current Programme is more successful in reaching organisations from third countries, with a slightly higher share of respondents funded under the current Programme indicating having non-EU partners compared with the previous Programme¹⁷⁷. Amongst respondents whose projects had included non-EU and have since ended, the vast majority (80%; n=305) of those collaborations continued after the project ended, highlighting a strong tendency for sustained international collaboration. There were no notable differences across Sub-programme/strand.

Overall, stakeholders considered the help provided by the **Creative Europe Desks** to be useful, particularly in relation to application support and raising awareness on Creative Europe. Creative Europe Desks were the main source of information on the Programme reported by respondents to the beneficiary survey¹⁷⁸, although they were reported to have been the primary information source for more MEDIA beneficiaries than Culture or Cross-sectoral beneficiaries¹⁷⁹. As shown in Figure 5, a lower share of beneficiaries from the Culture and Cross-sectoral Sub-programme/strands reported being aware of their country's Desk, compared to MEDIA beneficiaries. Nevertheless, the majority of beneficiary survey respondents indicated the quality of information received by the Desks was good or very good, which was a sentiment also shared by interviewees. Stakeholders mentioned during the interviews that the Desks were particularly useful in helping with applications, explaining changes in specific actions, and conducting outreach to key target groups¹⁸⁰. However, some interviewees mentioned that the quality of support varies across countries, and that they do not always have the most up-to-date information from the Commission, which impacts their effectiveness¹⁸¹.

¹⁷⁶ This view was shared by beneficiaries.

¹⁷⁷ 43% (n=785) of respondents funded under the current Programme reported having non-EU partners compared with 38% (n=264) under the previous Programme.

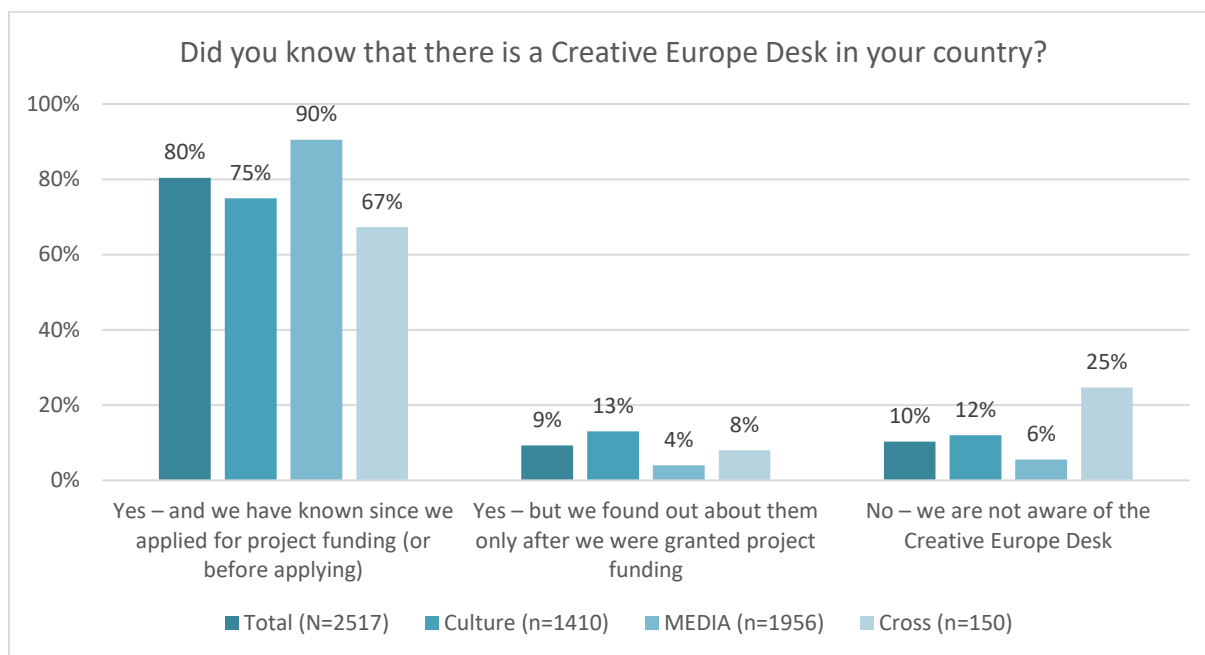
¹⁷⁸ 53% (n=1,188) of respondents to the beneficiary survey indicated that the Creative Europe Desks were their primary source of information on the Creative Europe Programme, followed by the Education, Audio-visual and Culture Executive Agency (EACEA), which 35% (n=886) of respondents viewed as their main source of information.

¹⁷⁹ 64% (n=579) of MEDIA beneficiaries reported using Creative Europe desks as their primary source of information compared with 44% (n=546) of Culture beneficiaries and 56% (n=63) of Cross-sectoral beneficiaries.

¹⁸⁰ This view was expressed by sectoral organisations and an EU-level policymaker.

¹⁸¹ This view was expressed by sectoral organisations.

Figure 5. Beneficiary survey responses on the help received from Creative Europe Desks, by Sub-programme/strand



Source: Beneficiary survey

External factors

The stakeholder consultation activities also explored the impact of external challenges on the implementation of the Programme, namely the withdrawal of the United Kingdom from the European Union (Brexit), the COVID-19 pandemic, and the war of aggression against Ukraine by the Russian Federation.

Regarding **Brexit**, there was mixed feedback from stakeholders consulted on the overall impact on the Creative Europe Programme. While only 18% (n=451) of respondents to the beneficiary survey indicated their project was impacted by the UK's withdrawal from the EU, 59% (n=107) of respondents to the OPC indicated it had a high or moderate impact on their activities. There was a slight difference across Sub-programme/strand, with 22% (n=210) of respondents from the MEDIA Sub-programme/strand indicating an impact, compared with 16% (n=225) of respondents from the Culture Sub-programme/strand and 11% (n=16) from the Cross-sectoral Sub-programme/strand.

For those from the survey that indicated an impact, they indicated reduced collaboration with UK organisations, the loss of mobility opportunities with the UK, and the interruption of ongoing projects or planned collaborations as the main areas impacted. Many of these impacts were also mentioned by interviewees, with some mentioning that projects with long-standing collaborations with UK entities faced major setbacks, particularly in the audiovisual sector, as the UK is a major content producer and distribution market¹⁸². However, other interviewees indicated that Brexit had a largely positive impact on the audiovisual, cultural and creative sectors in Europe, as there was one less country competing for funding, and some key players, such as venture capital firms, relocated to Europe.

On the other hand, the **COVID-19 pandemic** was reported to have had a much larger impact on the European audiovisual, cultural and creative sectors. The majority of respondents to the OPC (69%; n=127) indicated the pandemic having a high or moderate impact on the implementation of Creative Europe, higher than both other key external factors. Beneficiaries interviewed from the MEDIA Sub-programme/strand mentioned delays in production and the closing of cinemas, while beneficiaries from the Culture Sub-programme/strand mentioned the disruption of in-person events. Stakeholders interviewed across the Programme mentioned the lasting impacts of the pandemic on inflation, operational costs, and consumer behaviour.

The majority of respondents to the beneficiary survey that had projects active between 2020 and 2021 (55%; n=355) indicated not benefitting from the COVID-19 measures introduced by Creative Europe to mitigate the effects of the pandemic. However, beneficiary interviewees that did receive support reported that it alleviated some of the effects of the pandemic, although it did not entirely make up for additional costs and it was a long time before the grant was finally received¹⁸³. Beneficiaries from the Culture Sub-programme/strand in particular mentioned the flexibility shown by the Programme in enabling organisations to adapt planned activities to the reality of the pandemic, such as by moving events online.

¹⁸² This view was expressed by beneficiaries from the MEDIA and Culture Sub-programme/strands, as well as stakeholder organisations and Creative Europe Desks.

¹⁸³ This view was expressed by beneficiaries from the MEDIA and Culture Sub-programme/strands.

Lastly, a smaller share of respondents indicated there being an impact from the **war of aggression against Ukraine by the Russian Federation** on their activities and the implementation of Creative Europe. A majority of respondents to the OPC (54%; n=73) indicated the war had an impact on the implementation of the Programme, while only 18% (n=452) of respondents to the beneficiary survey indicated that their projects were directly impacted. However, similarly to the COVID-19 pandemic, stakeholders have mentioned the impact the war has had on inflation and operational costs, which they feel has not yet been addressed by the Creative Europe Programme¹⁸⁴.

Only 3% (n=68) of respondents to the beneficiary survey indicated that their organisation benefitted from specific measures under Creative Europe implemented in response to the war. MEDIA beneficiaries interviewed expressed appreciation for Ukraine joining the MEDIA Programme; however, there were critiques on the slow response and limited opportunities to support Ukrainian audiovisual professionals in the meantime. Beneficiaries consulted from the Culture Sub-programme/strand expressed a different perspective, with many sharing appreciation for the swift and targeted response from Creative Europe, which facilitated special sessions and targeted support for Ukrainian artists being provided by European cooperation and network projects.

In addition to the challenges discussed above, respondents to the beneficiary survey mentioned organisational issues, such as delays or limited resources, funding limitations, and communication challenges, such as language barriers and cultural differences, as also creating barriers to the achievement of project results¹⁸⁵. Further, respondents to the OPC mentioned co-funding rates, the influence of geopolitics, and inflation as additional factors that impacted the overall effectiveness of the Programme.

Efficiency

Size of Creative Europe budget

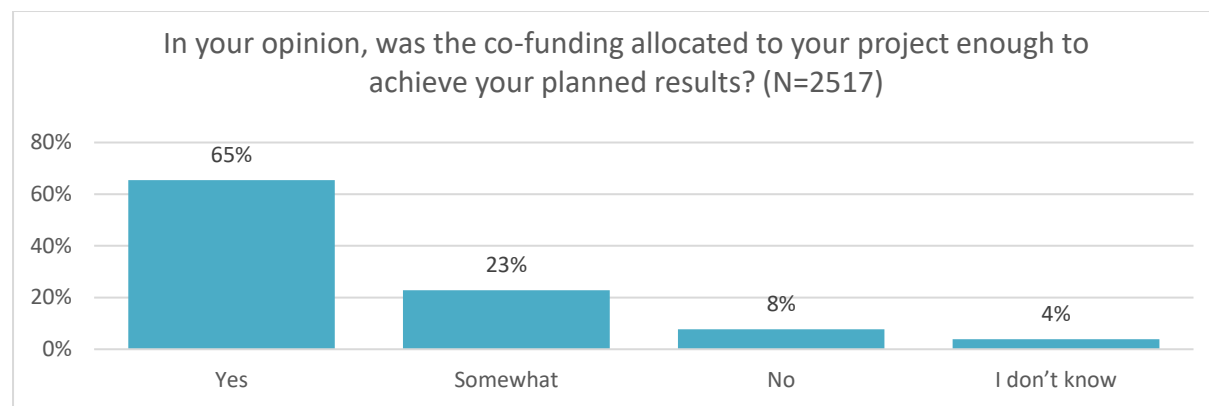
Consultation activities present a mixed picture of stakeholders' views on whether the size of the Creative Europe budget is appropriate and proportionate in relation to its objectives. Whilst the majority of respondents to the beneficiary survey felt that the budget allocated to their project was sufficient to achieve their goals, insights from stakeholder interviews offer a more nuanced perspective.

¹⁸⁴ This view was expressed by beneficiaries and sectoral organisations.

¹⁸⁵ Amongst open responses to this question, 29% (n=88) mentioned external challenges, 26% (n=80) mentioned organizational issues, and 21% (n=65) mentioned funding limitations.

As shown in Figure 6, 88% (n=2224) of respondents to the beneficiary survey thought that the co-funding allocated to their project was either fully (65%; n=1648) or somewhat sufficient (23%; n=576) to achieve their planned results.

Figure 6. Satisfaction with co-funding allocated to projects



Source: Beneficiary survey

MEDIA stakeholders interviewed recognised that the overall budget for the 2021-2027 Programme increased, in particular for their strand. However, they noted that this increase did not make a significant difference due to **high inflation rates** and **production costs**. Rising costs due to inflation and external factors, such as the war in Ukraine and COVID-19, were also highlighted in the beneficiary survey by respondents who found the co-funding allocation insufficient to achieve all planned results (14%, n=81, and 6%, n=32, respectively). Stakeholders interviewed from the Culture Sub-programme/strand reported that inflation has made **staffing** and **operational expenses** difficult to manage within the allocated budget, despite the importance of co-financing for project feasibility. In terms of supporting applicants, Creative Europe Desks interviewed mentioned that budget constraints limit their ability to attend key industry events, enhance support activities, and respond to all inquiries.

The **lower co-financing thresholds** in the current Programme were praised as a welcome improvement by beneficiaries interviewed from the Culture strand. However, among the survey respondents who were asked to detail why the co-funding allocation was insufficient, 13% (n=76) reported difficulties in securing their own funds, which hindered their ability to achieve planned results. Different national contexts influenced the adequacy of the funding,

according to 5% of respondents (n=31). According to interviewees, securing national or private funding proved more difficult in Eastern Europe. Nonetheless, survey data reveals that both higher and lower income countries were affected by funding difficulties. Higher income countries faced higher personnel costs, whilst lower income countries struggled to access funding. Factors such as lack of support from national authorities (1%; n=6), organisation type (e.g. NGOs and Universities) (1%; n=5), and the size of the project (13%; n=76) impacted the difficulty in securing funding, with 4% of respondents (n=22) highlighting the specific difficulties of being a small project/organisation.

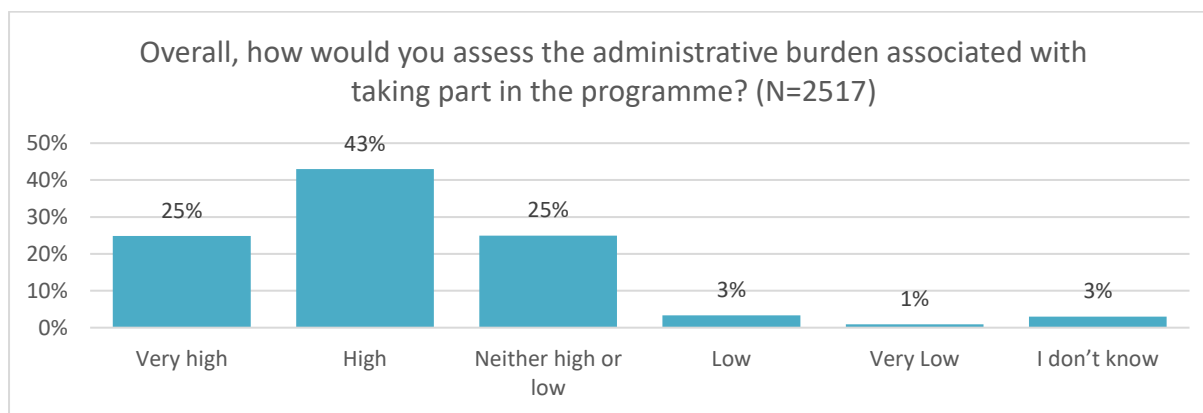
This particular difficulty smaller organisations face in securing funding was echoed in interviews with Culture stakeholders. Most stakeholders noted that while lead partners received substantial funding, smaller partners faced significant shortfalls, particularly in projects with numerous partners.

Some MEDIA stakeholders expressed concerns that the introduction of new actions and priorities to the MEDIA Programme, such as AI and video games, may limit support for more traditional industries. In the Culture sector, many interviewed stakeholders recommended that future budgets account for inflation and consider revising the allocation across different Programme strands. This adjustment would help ensure the Programme remains competitive and effective in achieving its objectives.

Application, monitoring and reporting processes

Overall, the administrative burden associated with participating in the Programme was still perceived as high by survey respondents and interviewees. Indeed, as shown in Figure 7, more than two thirds of respondents (68%; n=1707) found the administrative burden either high or very high. This was echoed in interviews with both MEDIA and Culture stakeholders.

Figure 7. Administrative burden associated with taking part in the Programme

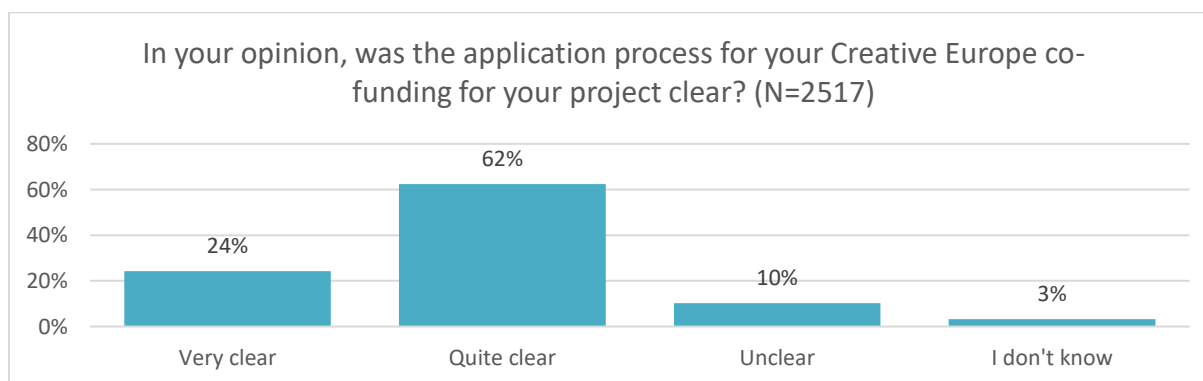


Source: *Beneficiary survey*

Both the survey results and targeted stakeholder interviews reveal that whilst beneficiaries generally find the application process for Creative Europe co-funding to be **clear**, they also face **significant challenges** when preparing an application.

As shown in Figure 8, most respondents to the beneficiary survey (86%; n=2180) found the application process either very clear or quite clear.

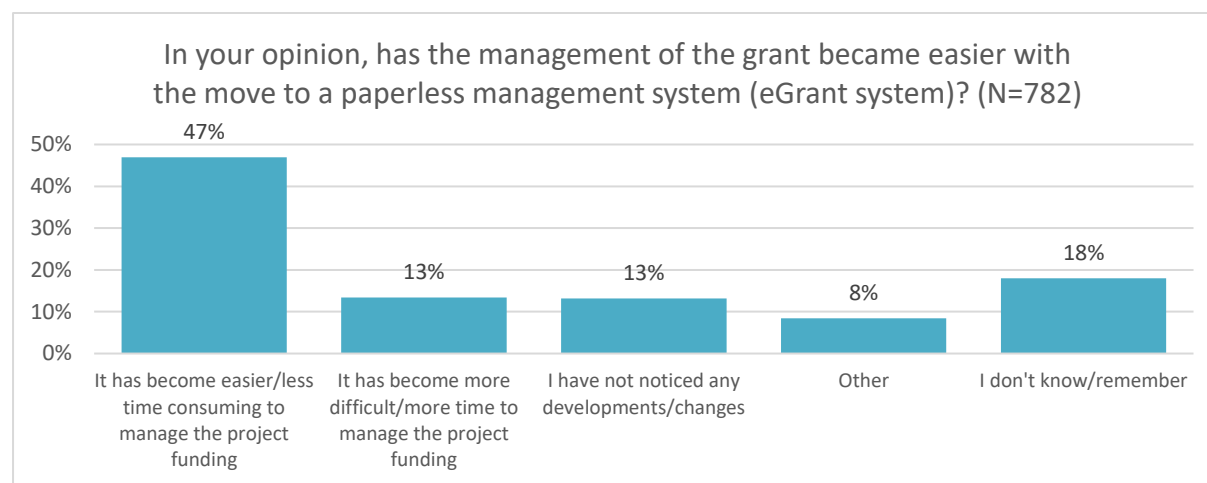
Figure 8. Clarity of the application process



Source: Beneficiary survey

This positive perception can be attributed to the transition to an **online platform** (i.e., eGrant), which was praised by 40% (n=312) of survey respondents (as illustrated in Figure 9) and most MEDIA stakeholders interviewed.

Figure 9. Increased efficiency of grant management through the eGrant system



Survey respondents who felt that eGrant simplified the application process described it as easier (38%; n=164), more efficient (20%; n=85), clearer (5%; n=22), environmentally friendly (2%; n=10), and user-friendly (1%; n=4).

Source: Beneficiary survey

However, a closer examination of the survey and interview data reveals several challenges that affect eGrant's ability to simplify the application process. Among the 20% (n=153) of respondents who found the eGrant system made applying for funding more difficult or time-consuming, 15% (n=65) found it complicated to use, 12% (n=51) reported it was more time-consuming, 10% (n=42) considered it a subpar platform, and 6% (n=28) encountered various difficulties.

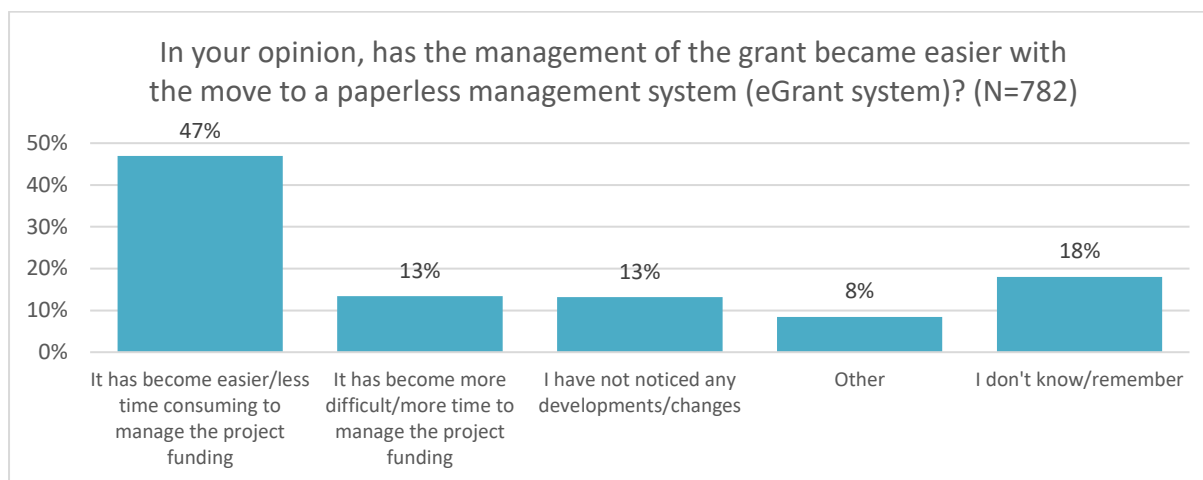
Moreover, the majority of MEDIA stakeholders interviewed reported that the application process, including the application portal, is burdensome, **especially for smaller organisations** that do not necessarily have dedicated staff for EU tenders. This difficulty for smaller organisations during the application process was also reported among stakeholders interviewed from the Culture Sub-programme/strand.

The biggest challenge in relation to administrative procedures for MEDIA stakeholders is that the **application form is not specific to different sectors' needs** and includes non-relevant technical specifications and jargon. Therefore, a large number of questions are not relevant for applicants, which can be confusing, especially for those new to the process. Some stakeholders also reported that the **funding timelines** were inconvenient for their needs. Additionally, the platform has **technical difficulties**, for example, the inability to modify an application after it is submitted and before the implementation starts, file size limits, and the application and reporting forms' non-compatibility with certain browsers.

Beyond the application stage, survey and interview data present a mixed picture of the improvements eGrant has brought to overall **grant management**.

Survey respondents involved in both Programmes were asked whether the eGrant system eased the management of the grant (N=782). As illustrated in Figure 10, most of these respondents (47%; n=367) found that **the eGrant system made it easier/less time consuming to manage the project funding**. 13% of respondents (n=105) viewed the management as more difficult/ requiring more time to manage the project funding and another 13% did not notice any developments or changes (n=103). 8% of respondents provided other answers (n=66) and 18% did not know or remember (n=141).

Figure 10. Increased efficiency of grant management through the eGrant system



Source: Beneficiary survey

Among those who found grant management to be easier with eGrant, benefits included improved efficiency (25%; n=107), having all information centralised (3%; n=13), enhanced environmental sustainability (3%; n=11), greater clarity (2%; n=9), and user-friendliness (1%; n=4). The eGrants system was also seen as an important improvement **after the funding contract was signed** by MEDIA stakeholders interviewed. These interviewees reported that eGrants made the payment process much faster and made it easier for beneficiaries to receive pre-financing for their projects.

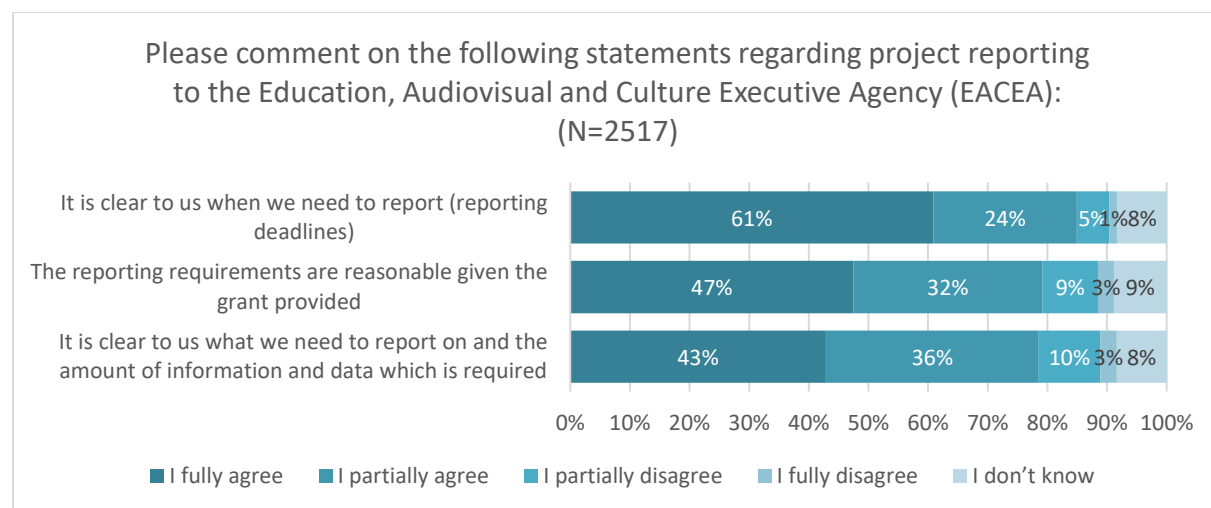
However, survey responses and interviews revealed a mixed picture on **monitoring and reporting processes**.

Whilst stakeholders from both the MEDIA and Culture Sub-programmes praised the introduction of **lump-sum funding**, they also noted limitations in improving overall efficiency. On the one hand, MEDIA stakeholders reported that lump-sum payments help reduce the administrative burden associated with monitoring. This sentiment is echoed by Culture stakeholders, who found that lump-sum payments significantly alleviate the Programme's administrative load. Previously, the processing of numerous invoices required extensive documentation, creating difficulties, especially for smaller partners. On the other hand, MEDIA stakeholders noted that the impact of lump-sum funding is limited in sectors where costs can vary widely, such as production. Additionally, Culture stakeholders at the EU level highlighted inefficiencies with lump-sum payments, suggesting that while they are useful for simpler actions, more tailored approaches may be necessary for larger cooperation projects. Among the 13% (n=105) of survey respondents who found **grant**

management to be more difficult/time-consuming with eGrant, 5% (n=22) described it as more challenging or time-consuming, citing increased complexity (9%; n=39) and broader platform-related issues (6%; n=27) and other difficulties (5%; n=22). Culture stakeholders reported that, although the eGrant system has reduced some administrative burdens compared to the 2014-2020 Programme, significant complexities remain. These include **persistent bugs and challenges with the centralised tool**, especially in **distinguishing between mandatory and optional reporting elements**. Sectoral organisations in the media sector found monitoring and reporting too complex and time-consuming. For example, it is **not possible to anticipate** it as the reporting format is not available in advance, and **calculating unit costs** adds to the administrative burden.

However, in terms of reporting to EACEA, most survey respondents (85%; n=2138) fully or partially agreed with the clarity of reporting deadlines as shown in Figure 11. 79% of respondents fully or partially agreed that reporting requirements are reasonable given the grant provided (n=1993) and that the content of reporting and amount of information and data required are clear (n=1977).

Figure 11. Efficiency of reporting to the EACEA



Source: Beneficiary survey

Survey responses and interviews with Culture stakeholders highlighted several key suggestions for simplifying the Programme's implementation. **Simplifying the grant agreement process** and **providing clearer guidelines for documentation** were seen as crucial steps to alleviate the administrative burden. Additionally, adopting **a risk-based monitoring approach** could enhance cost efficiency by focusing on areas of high financial and operational risk. Some survey respondents also provided specific recommendations to improve monitoring, reporting and interaction with EACEA: 22% (n=101) suggested reducing the administrative burden, 13% (n=57) called for a more flexible reporting system, and 17% (n=76) recommended making the platform more user-friendly. Direct interaction with personnel, such as policy officers, was viewed as beneficial by 15% (n=67) of respondents. Other suggestions included providing clearer information (14%; n=63), sample reports and projects (5%; n=23), automatic email reminders (5%; n=22), organised kick-off meetings (4%; n=18), more training sessions (3%; n=12), and holding informative events and webinars (2%; n=9). *Information flow and communication between different Creative Europe actors.* Data on the efficiency of information flow and communication among different Creative Europe actors primarily comes from targeted stakeholder interviews. According to MEDIA stakeholders, the information flow between Desks, the EACEA, and Commission services has **improved over recent years**. Effective communication mechanisms, such as regular meetings, coordination between Desks, and the use of Microsoft Teams, have contributed to this improvement. However, there is room for improvement in **communication regarding new or changed calls**. Interviewees noted that information about calls is often not provided to Desks with sufficient advance notice, making it challenging to inform applicants promptly. This issue is particularly problematic during busy periods, causing delays in supporting applicants. As regards the Culture Sub-programme/strand, stakeholders generally indicated that **communication is efficient**, although some challenges persist. While the EACEA is recognised for its organisational capabilities and support, there is friction between the European Commission and the Executive Agency regarding the integration of special calls into work programmes. An EU-level policymaker highlighted that the EACEA operates within a rigid structure with established procedures, allowing it to organise its work throughout the year. However, the addition of special calls on top of the usual Creative Europe calls creates an administrative burden that should be better managed by the Executive Agency. One beneficiary expressed frustration with the current communication platform, which reportedly does not function effectively and noted delays in receiving responses from project officers, which can hinder administrative processes.

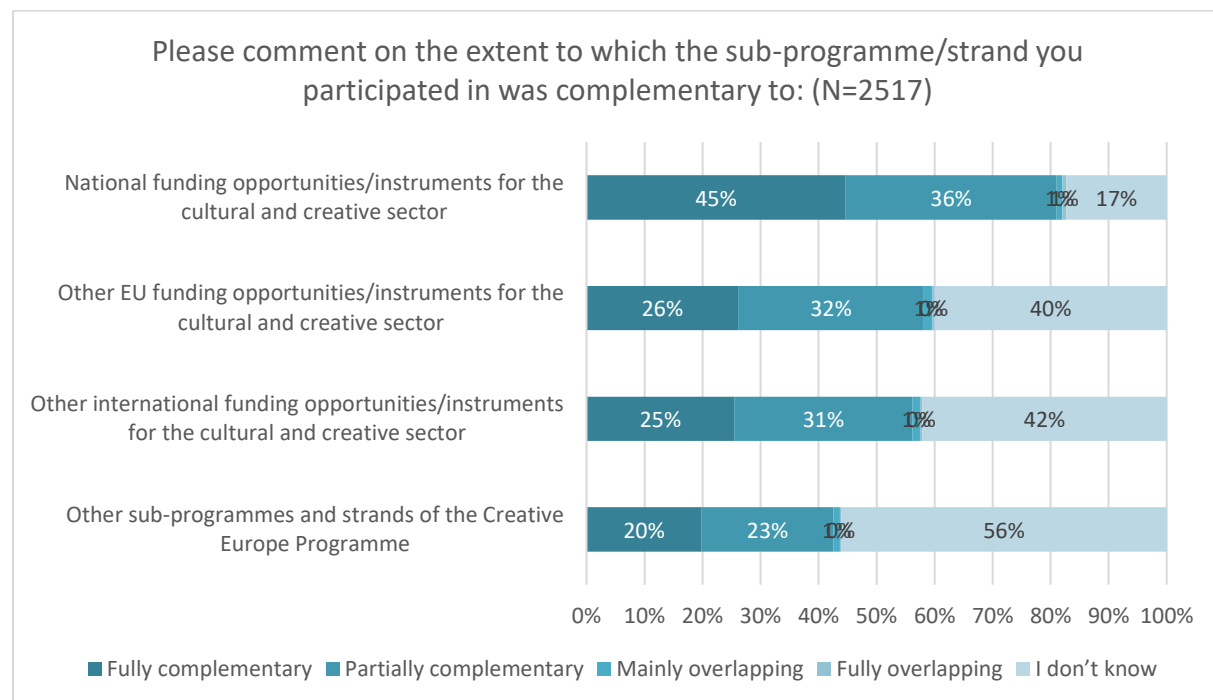
Coherence

Evidence from both survey responses and interviews highlighted internal and external coherence of the Programme despite areas for improvement remain.

The Creative Europe 2014-2020 and 2021-2027 Programmes generally demonstrate complementarity with national, EU, and international funding opportunities.

While evidence from interviews is mixed, survey results indicate a strong perception of this complementarity, with 81% of respondents (see Figure 15 below) finding their respective Sub-programmes or strands fully or partially complementary to national funding opportunities. Similarly, 58% identified alignment with other EU funding instruments, while 56% noted compatibility with international funding sources. The findings were consistent across the 2014-2020 and 2021-2027 Programmes. In both periods, respondents largely perceived complementarity with national, EU, and international funding, although the Cross-sectoral strand consistently rated lower in complementarity with national and international funds compared to the Culture and MEDIA strands. Nonetheless, Cross-sectoral strand beneficiaries rated their complementarity with other EU funding sources and Creative Europe strands higher than those in the Culture and MEDIA strands.

Figure 12. Complementarity of Sub-programme/strand to funding opportunities/ instruments and other Sub-programmes/strands



Source: Beneficiary survey

Despite these positive perceptions, **areas for improvement remain**. Respondents indicated that the first Creative Europe Programme mainly overlapped with national funds, especially in Austria and Belgium. In contrast, the second Creative Europe Programme highlighted overlaps primarily with other EU funding sources, such as initiatives from the Council of Europe, European Capitals of Culture, and Culture Moves (47%; n=7), as well as national (27%; n=4), local/regional (13%; n=2), and international funding (13%; n=2). Overlaps were also noted in activities related to international mobility (27%; n=4) and policies on green and digital transitions (13%; n=2). These findings indicate that while complementarity exists, certain areas could benefit from improved coordination, especially at the EU level. **In terms of complementarity to other EU initiatives**, MEDIA interviewees were able to comment on coherence with regard to **Horizon Europe**. Interviewees thought that while Horizon Europe could be relevant for MEDIA beneficiaries for R&D purposes (e.g., innovation, game development), many organisations are either not aware of Horizon Europe opportunities or calls are too technical for most industry players. Two interviewees also mentioned complementarity with the Eurimages call from the Council of Europe (CoE), which provides gap financing for specific projects by film creators. While Creative Europe supports organisations overall, it does not cover the production phase, where CoE funding is particularly beneficial. Moreover, Creative Europe's focus on cultural diversity in Europe does not align with the primary aims of Eurimages or UNESCO calls, thereby creating a complementary relationship with these funding options¹⁸⁶.

At the national level, Creative Europe funding has been essential for addressing gaps in national funding opportunities across several Member States and sectors. MEDIA beneficiaries reported significant gaps in national funding, particularly in areas such as video games in Sweden and distribution in Poland, where few funding options are available.¹⁸⁷ Conversely, where there are sufficient national funding sources available (e.g. for national production or local distribution in most Member States), there are no overlaps, as these areas are not supported by CE. As a result, CE is **complementary to national-level funding opportunities** and objectives¹⁸⁸. However, stakeholders expressed that improved coherence between the timings of national and EU-level calls, as well as the awarding of funds, could facilitate more efficient planning of productions and resource allocation.

Most cultural stakeholders reported that Creative Europe activities align well with national objectives while maintaining distinct focuses. However, the **interaction between EU and national policies is complex, and the extent of the Creative Europe Programme complementarity largely varies by country**. As noted by a stakeholder from the Culture strand, EU policies and funding sometimes drive change, while at other times, they reinforce existing

¹⁸⁶ Interviews with representatives of two beneficiaries and a sectoral organisation.

¹⁸⁷ Interviews with representatives of two sectoral organisations and a beneficiary.

¹⁸⁸ Interviews with representatives of two beneficiaries and CE Desk.

frameworks. For instance, in Poland, Creative Europe initiatives have influenced national debates and political priorities, while Sweden and Germany experience different benefits from the Culture strand.

Ultimately, Creative Europe fills gaps by supporting international mobility and audience development, areas typically overlooked by national and regional funding. According to consulted stakeholders, the international focus is crucial for fostering broader European and global perspectives in the cultural sector—perspectives that regional funding alone cannot achieve.¹⁸⁹

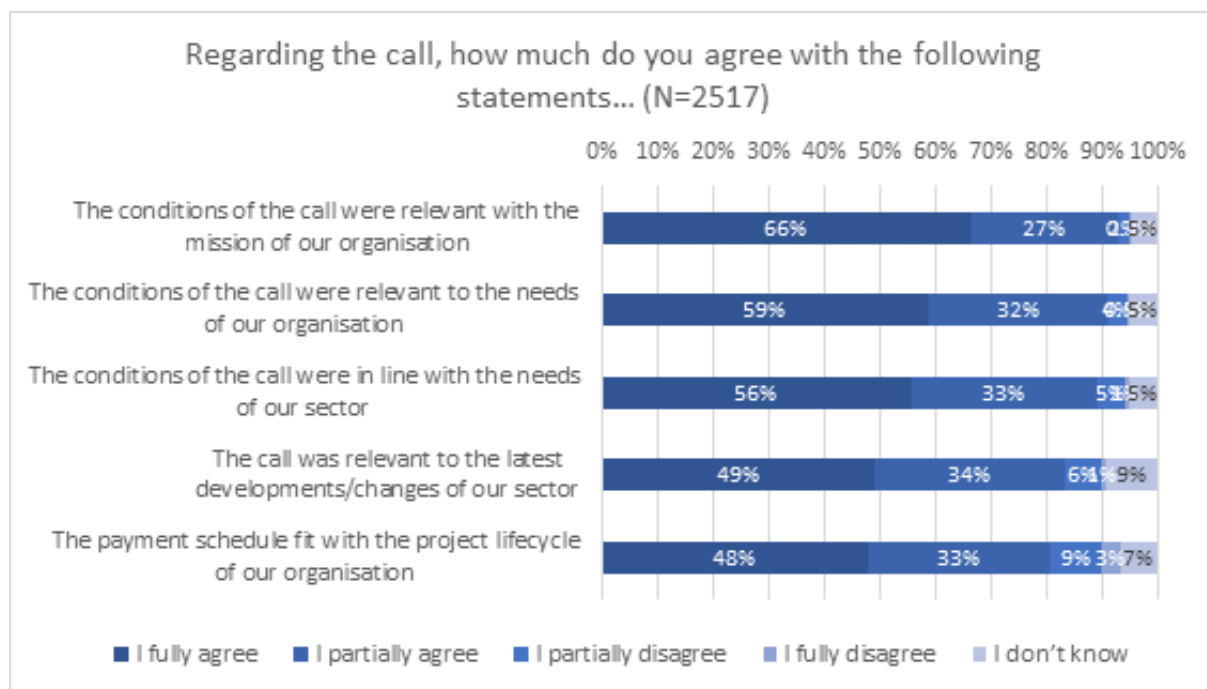
Relevance

The majority of the stakeholders across consultation activities have indicated that the **Creative Europe Programmes effectively address the needs and priorities of the culture and audiovisual sectors**. This finding is consistent across strands and supported by evidence from the beneficiaries' survey, the open public consultation, and stakeholder interviews.

As shown in Figure 13, according to the beneficiaries' survey, nearly all respondents indicated that the conditions of the call were relevant to their organisation's mission (93%) and needs (91%). Furthermore, 89% agreed that the conditions aligned with their sector's needs. This finding was reinforced by stakeholder interviewees, who confirmed that the Programme's alignment with sectoral priorities was a key strength, particularly in adapting to recent trends and technological changes. Similarly, **stakeholders in the MEDIA and Culture strand** consulted in the OPC stressed how the Programme successfully promoted visibility and competitiveness in the European audiovisual sector, as 87% of respondents from the open public consultation acknowledged these benefits.

Figure 13. Respondents' view on the relevance of the call

¹⁸⁹ Interview with a sectoral organisation and an EU-level policymaker.

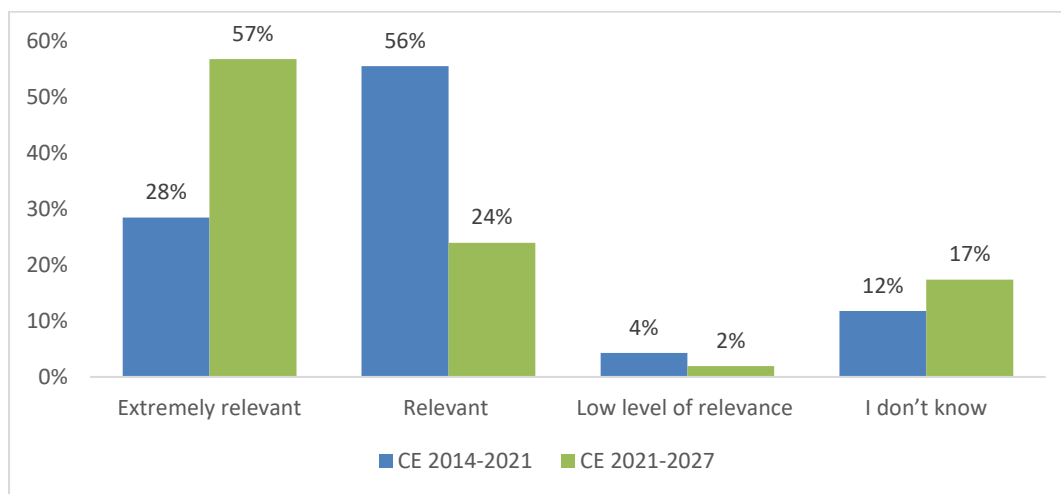


Source: Beneficiary survey

Further evidence shows that the Programme's relevance was generally consistent across Sub-programmes and regions, though some geographical differences emerged. For example, survey's respondents from Estonia and Slovakia (96% each) emphasised the Programme's high relevance to their national contexts, a view shared by interviewees who represented smaller organisations from less advantaged regions. However, challenges remained regarding project lifecycles and payment schedules, with Dutch (24%) and Norwegian (28%) survey's participants expressing dissatisfaction. Interviews with stakeholders in these regions pointed to specific issues in administrative flexibility and cash-flow management, which still required attention despite broad Programme support.

The evolution from the 2014-2020 to the 2021-2027 Programme edition was also perceived positively, according to both the beneficiaries' survey and interview responses.

Figure 14: Relevance of Creative Europe Programme priorities to sector needs (2014-2020¹⁹⁰ vs 2021-2027¹⁹¹)



Source: Beneficiary survey

In the 2014-2020 Programme, 28% of **survey respondents** felt the priorities were extremely relevant without the need for further adjustments, compared to 57% in the 2021-2027 Programme. **This 29-percentage point increase** was echoed by **OPC respondents and stakeholder interviews**, which highlighted the 2021-2027 Programme's greater flexibility, stronger alignment with societal challenges, and improvements in administrative processes.

Additionally, stakeholders provided positive feedback on the importance of the Programme in promoting networking, capacity-building, and intercultural dialogue. In the OPC, 94% of respondents noted the Programme's strong contribution to capacity-building, a view that was also underlined by interviewees who praised the Programme's role in fostering cross-border collaboration. Lastly, while the Creative Europe Programme was seen as generally adaptive to sectoral needs, challenges in addressing technological advances, such as Artificial Intelligence (AI), were noted. Both survey respondents and interviewees

¹⁹⁰ Question "To what extent were the Programme priorities and type of projects supported under your Creative Europe's Sub-programme relevant to the challenges and needs within your sector?" (Responses=281)

¹⁹¹ Question "To what extent were the Programme priorities and type of projects supported under your Creative Europe's Sub-programme relevant to the challenges and needs within your sector?" (Responses=939)

in the audiovisual sector voiced concerns that while AI presents opportunities for efficiency, an overemphasis on it might undermine traditional creative processes.

EU added value

Added value compared with other support schemes

For Media strand stakeholders, a triangulation of the results from the consultation activities reveals that in addition to other support schemes available at international and national levels, Creative Europe provides added value through **cross-border collaboration and networking**; the **production of culturally diverse content**; and **access to funding for activities that are not covered by other Programmes**. For example, the Open Public Consultation showed that Creative Europe adds value through the international visibility and international market access it provides (33%, 20);¹⁹² the networking and collaboration opportunities (especially at pan-European and international levels) (28%, 17); the cultural diversity it promotes through the variety of cultural forms it supports (20%, 12); and the Programme's capacity to fill in the gaps unsupported at local and national level (17%, 10). In the interviews, Media stakeholders shared that Creative Europe funding helps reduce the high risks associated with audiovisual content creation and distribution. As a result, creative organisations with different levels of capacity can develop and circulate content leading to greater cultural diversity in the European market as opposed to what would be produced by large players.¹⁹³

Media strand interviewees also mentioned how CE funding has a meaningful impact on building strong industry partnerships, cross-border collaboration and European networks, which facilitate knowledge-sharing, networking and skills development in the industry¹⁹⁴. In this respect, early-stage collaboration as part of the co-development scheme in the 2021-2027 Programme strongly contributed to more diverse and equitable partnerships, including with countries which were previously not considered¹⁹⁵. Cross-border partnerships across Europe remain a key distinction of CE in comparison to other national or international funding programmes and schemes. These findings were reinforced in the beneficiary survey, where a large majority of Media respondents expressed that compared with other culture and audiovisual sector support schemes, Creative Europe enables more diverse geographical coverage,

¹⁹² Calculated out of 60 respondents to this question

¹⁹³ Interviews with representatives of three sectoral organisations and two beneficiaries.

¹⁹⁴ Interviews with representatives of two beneficiaries, two CE Desks and EU level policy maker.

¹⁹⁵ Interviews with representatives of a sectoral organisation and a beneficiary

particularly with EU countries (75%,191);¹⁹⁶ followed by, a stronger cross-border dimension (68%, 172);¹⁹⁷ and also financing opportunities for activities not covered by other programmes (65%,165).¹⁹⁸ These responses were consistent across both programming periods, ranked in the same order for survey respondents answering about 2014-2020 and 2021-2027.

For Culture strand stakeholders, the most appreciated aspects of Creative Europe compared to other culture or audiovisual sector support schemes were: **cross-border networking and collaboration opportunities; support for innovation; support for projects that would otherwise not be funded; and international visibility.** These areas were frequently mentioned in the OPC, the beneficiary survey, and the interviews. Indeed, according to Culture strand interviewees, the Creative Europe Programme provides significant EU added value compared to national or regional initiatives through its support for transnational cooperation. Interviewees expressed that this cross-border focus allows for wider circulation of works and artists, fostering innovation and knowledge sharing that would be difficult to achieve through national funding alone.¹⁹⁹ Interviewees also mentioned that Creative Europe is seen as crucial in filling gaps left by limited national cultural budgets. For example, in countries with lower cultural investments, such as parts of Eastern Europe, it plays a significant role in sustaining cultural activities. In larger markets, the Programme complements national funding by promoting international collaboration, something often lacking in national schemes.²⁰⁰

For Culture stakeholders in both the OPC and the beneficiary survey, the most highly rated area of Creative Europe's added value, compared to other culture schemes at international and national levels, was the cross-border networking and collaboration opportunities it provides (53%, 26, in the OPC²⁰¹ and 69%, 401, in the beneficiary survey²⁰³). The interviewees added that the Programme's emphasis on internationalisation enables cultural sectors to scale up and engage with broader European and global audiences, offering a unique value compared to other funding sources. This was echoed in the

¹⁹⁶ 75% (n=191) out of 255 respondents representing the Media strand of the 2021-2027 Programme (most frequently mentioned area); 73% (n=124) of 170 respondents representing the Media Sub-programme of the 2014-2020 Programme (most frequently mentioned area)

¹⁹⁷ 68% (n=172) out of 255 respondents representing the Media strand of the 2021-2027 Programme (second most frequently mentioned area); 63% (n=107) of 170 respondents representing the Media Sub-programme of the 2014-2020 Programme (second most frequently mentioned area)

¹⁹⁸ 65% (n=165) out of 255 respondents representing the Media strand of the 2021-2027 Programme (third most frequently mentioned area); 60% (n=102) of 170 respondents representing the Media Sub-programme of the 2014-2020 Programme (third most frequently mentioned area)

¹⁹⁹ Interview with representatives of sectoral organisations, an EU-level policymaker, and a Creative Europe Desk.

²⁰⁰ Interview with representatives of sectoral organisations, an EU-level policymaker, a beneficiary and a Creative Europe Desk.

²⁰¹ The open-ended responses of 49 respondents to the question "In your opinion, what does the Creative Europe Programme offer in addition to other culture and audiovisual sector support schemes available at both international and national levels?" was qualitatively analysed to create this list.

²⁰² Calculated out of 49 respondents

²⁰³ 69% (n=401) out of 581 respondents representing the Culture strand of the 2021-2027 Programme (most frequently mentioned area); 68% (n=196) of 288 respondents representing the Culture Sub-programme of the 2014-2020 Programme (second most frequently mentioned area)

beneficiary survey, as a large majority of respondents also expressed that in addition to other schemes, Creative Europe offers more diverse geographical coverage, particularly with EU countries (69%, 399)²⁰⁴; and financing opportunities for activities not covered by other programmes (64%, 371)^{205 206}. The OPC also revealed that compared with other schemes, Creative Europe provided added value through the cultural diversity of the projects it supports (24%, 12); the international visibility and international market access it provides projects (16%, 8); its support for innovation and risk-taking (16%, 8), and the soft power of the Programme in promoting EU values, the visibility of Europe abroad, or peace-building (14%, 7).

There were comparably fewer consulted stakeholders who were familiar with the Cross-sectoral strand and its added value, but the results nonetheless reflected those from Media and Culture strand stakeholders discussed above. In the beneficiary survey, respondents familiar with the cross-sectoral strand also expressed that in addition to other culture and audiovisual sector support schemes, Creative Europe offers more diverse geographical coverage, particularly with EU countries (65%, 65)²⁰⁷; a stronger cross-border dimension (61%, 61)²⁰⁸ and financing opportunities for activities not covered by other programmes (61%, 61)²⁰⁹. These responses only reflect the 2021-2027 period as there were very few (3) valid responses for the 2014-2020 period. In the OPC, there were also very few respondents representing the Cross-sectoral stand. Respondents mentioned that the added value that Creative Europe offers²¹⁰ is the networking and collaboration opportunities it provides (especially at pan-European and international levels) (50%, 2)²¹¹ and its support for innovation and risk-taking (50%, 2).

Regarding the impact of Creative Europe on accessing other support schemes, according to the beneficiary survey, 63% (n=1374) of respondents²¹² said that Creative Europe had a positive impact on accessing *grants from the public sector*. Positive impact was also recorded on accessing *commercial funding opportunities*²¹³ accessing *private non-commercial funding opportunities (private funds)*²¹⁴. Only 3% (n=66) of respondents felt it had a large positive

²⁰⁴ 69% (n=399) out of 581 respondents representing the Culture strand of the 2021-2027 Programme (second most frequently mentioned area); 75% (n=216) of 288 respondents representing the Culture Sub-programme of the 2014-2020 Programme (most frequently mentioned area)

²⁰⁵ 64% (n=371) out of 581 respondents representing the Culture strand of the 2021-2027 Programme (third most frequently mentioned area); 62% (n=179) of 288 respondents representing the Culture Sub-programme of the 2014-2020 Programme (third most frequently mentioned area)

²⁰⁶ These survey responses were consistent across both programming periods, with slight differences explained in detail in the footnotes.

²⁰⁷ 65% (n=65) out of 100 respondents representing the Cross-sectoral strand of the 2021-2027 Programme (most frequently mentioned area)

²⁰⁸ 61% (n=61) out of 100 respondents representing the Cross-sectoral strand of the 2021-2027 Programme (second most frequently mentioned area)

²⁰⁹ 61% (n=61) out of 100 respondents representing the Cross-sectoral strand of the 2021-2027 Programme (second most frequently mentioned area)

²¹⁰ The open-ended responses of 4 respondents to the question “In your opinion, what does the Creative Europe Programme offer in addition to other culture and audiovisual sector support schemes available at both international and national levels?” was qualitatively analysed to create this list.

²¹¹ Calculated out of 4 respondents.

²¹² 36% (n=778) indicated that it had a large positive impact, 27% (n=596) said that it had a small positive impact

²¹³ Respectively, 11% (n=230) selected large impact and 21% (n=451) selected small impact

²¹⁴ 10% (n=215) selected large impact and 21% (n=450) selected small impact

impact and 8% a small impact (n=168) on accessing funding from *crowdfunding*. Only 17% of respondents (n=374) felt that Creative Europe was easier to access than other sectoral support schemes at international and national levels. There were no significant trends related to this identified in the other consultation activities, possibly as it is a question that mainly Programme beneficiaries can respond to.

The beneficiary survey also revealed that if their organisation had not received co-funding from the Creative Europe Programme, the vast majority of respondents (90%; n=2265) felt that the **project activities/elements their organisation implemented would have been impacted**, respondents indicating that they would have implemented some activities/projects but not others (46%; n=1154), or that they would not have implemented any (44%; n=1111). Only 6% (n=155) felt that their organisation would have implemented the projects/funded the activities without co-funding from the Creative Europe Programme. When asked to quantify the share of projects/project activities that would have been implemented without funding from Creative Europe, 77% of respondents expressed that half or less of such activities would have been implemented (n=1013).²¹⁵

Added value of the 2021-2027 Programme compared to the 2014-2020 Programme

The consultation activities revealed that the 2014-2020 and 2021-2027 had **similarities in the added value they provided**, such as in their promotion of cross-border activities, transnational activities, and the promotion of cultural diversity, which was consistently recognised across the three strands and Sub-programmes. There is some evidence to suggest that the 2021-2027 Programme increased the diversity of activities and created unity through inter-cultural activities (see the analyses by strand below).

As a general overview, the beneficiary survey provides insights into the difference between the two Programmes through the answers to open questions²¹⁶. Respondents frequently mentioned the increased added value of the 2021-2027 Programme because of its **higher Programme relevance (43%; n=90), larger impact (17%; n=36), and better accessibility (14%; n=30)**. Many participants felt that the 2021-2027 edition of the Programme aligned more effectively with sectoral needs. The thematic targeting of the calls was particularly well-received, especially in areas like cultural heritage protection and music. Respondents also appreciated the media literacy calls, with one noting that “the latest call acknowledged the new trends in the media landscape”. The Call for Evidence also revealed that many respondents positively acknowledged the increased budget for the 2021-2027 period of CE Programme, with more funding to specific sectors, especially the co-financing of the European Platforms for the promotion of emerging artists.

²¹⁵ Shares between 20% and 50% were the most frequently selected (69% combined; n=902).

²¹⁶ 207 respondents provided a valid response to this question.

Furthermore, respondents in the beneficiary survey widely praised the Programme's emphasis on cross-cutting issues, notably the green (10%; n=20) and digital (7%; n=15) transitions. Some respondents noted the significant influence of Creative Europe funding on **building capacity** in specific sectors within their countries, and also their organisations, citing examples where funding boosted their companies' strength and visibility. The 2021-2027 edition of Creative Europe was also considered **more accessible for both small organisations and small countries. Administrative simplification further enhanced accessibility**, with several respondents reporting easier and more accessible application and reporting processes. There was limited evidence in the interviews and Call for Evidence on the added value of the 2021-2027 Programme over the earlier Programme.

When looking into the difference between the 2014-2020 Programme and the 2021-2027 Programme in terms of the Media strand, the findings from the consultation activities are not fully cohesive and representative. For example, in the OPC, when comparing the 2014-2020 Programme with the 2021-2027 Programme, there were very far fewer respondents familiar with the earlier Programme (representing one eighth of the respondents familiar with the later Programme²¹⁷), so the findings need to be interpreted with this consideration. In the beneficiary survey there were also fewer respondents familiar with the earlier Programme, but not at such a stark ratio²¹⁸. According to the beneficiary survey, for Media respondents from different programming periods ranking areas of added value, **there wasn't a significant difference** between the added value of Creative Europe between the 2014-2020 and the 2021-2027 Programme. Media respondents in the survey showed that the added value of Creative Europe, in both programming periods, was that it **promotes cross-border cooperation, including through mobility**;²¹⁹ **the transnational character of actions and activities**;²²⁰ and **promoting European common roots and cultural diversity**.²²¹

²¹⁷ There were 10 respondents familiar with the 2014-2020 Programme and 80 respondents familiar with the 2021-2027 Programme.

²¹⁸ There were 170 respondents familiar with the 2014-2020 Programme and 255 familiar with the 2021-2027 Programme

²¹⁹ For those familiar with the 2021-23 Programme, 76% (n=158) out of 207 respondents rated this as an area where Creative Europe provides a very large or large added value. For those familiar with the 2014-2020 Programme, 67% (n=99) out of 149 respondents rated this as an area where Creative Europe provides a very large or large added value. This was the highest rated area in terms of added value in both programming periods

²²⁰ For those familiar with the 2021-23 Programme, 71% (n=147) out of 207 respondents rated this as an area where Creative Europe provides a very large or large added value. For those familiar with the 2014-2020 Programme, 64% (n=95) out of 149 respondents rated this as an area where Creative Europe provides a very large or large added value. This was the third highest rated area in terms of added value for the 2021-2027 Programme, and the second highest rated area for the earlier Programme.

²²¹ For those familiar with the 2021-23 Programme, 71% (n=147) out of 207 respondents rated this as an area where Creative Europe provides a very large or large added value. For those familiar with the 2014-2020 Programme, 62% (n=92) out of 149 respondents rated this as an area where Creative Europe provides a very large or large added value.

For Media strand respondents in the OPC²²² the 2021-2027 Programme was rated to have more added value in **fostering additional funding opportunities for the Audiovisual and cultural creative sector** compared to the 2014-2020 Programme²²³. The later Programme was rated to have more of an added value in **promoting cross-border cooperation, including through mobility** (among organisations and professionals in the cultural and creative sectors)²²⁴. Media interviewees also mentioned that early-stage collaboration as part of the co-development scheme in the later Programme strongly contributed to more diverse and equitable partnerships, including with countries which were previously not considered²²⁵. Lastly, in the OPC, a difference of what the later 2021-2027 Programme offered in addition to other support schemes at international and national level compared to the 2014-2020 was the **cultural diversity of the projects it supports**²²⁶. Another difference was that the later Programme was rated to provide **added value in filling in the gaps unsupported by schemes at local and national level**²²⁷, while this was not mentioned at all by respondents familiar with the 2014-2020 Programme. Similarly, the 2021-27 Programme was considered to provide added value in how it **supports the competitiveness and scale of projects**, which was mentioned by fewer respondents from the previous Programme²²⁸.

For Culture strand respondents in both the OPC and the beneficiary survey, there appeared to be few differences in added value between the 2014-2020 and the 2021-2027 Programmes. For example, in the beneficiary survey, the responses according to the different programming periods were almost identical. The added value of Creative Europe, according to both programming periods, was that it **promotes cross-border cooperation, including through mobility** (the highest rated area for added value in both Programmes)²²⁹, as well as how the Programmes **promote access to culture, active**

²²² As stated in the paragraph above, these findings from the OPC should be interpreted with the consideration that there were fewer respondents about the first Programme, so their answers are not representative

²²³ For those familiar with the 2021-2027 Programme, 78% (n=62) of 80 respondents stated that the Creative Europe Programme created a very large or large added value in this area, making it the highest rated area where the Programme created added value. In comparison, for those familiar with the 2014-2020 Programme, the Programme created a very large or large added value in this area for 50% (n=5) of 10 respondents, making it the fifth highest area where added value was created.

²²⁴ For those familiar with the 2021-2027 Programme, 71% (n=57) of 80 respondents stated that the Creative Europe Programme created a very large or large added value in this area, making it the second highest rated area where the Programme created added value. In comparison, for those familiar with the 2014-2020 Programme, the Programme created a very large or large added value in this area for 50% (n=5) of 10 respondents, making it the fifth highest area where added value was created.

²²⁵ Interviews with representatives of a sectoral organisation and a beneficiary.

²²⁶ This was 22% (n=11) out of 51 respondents for the 2021-2027 Programme, and it was a less commonly mentioned area in the 2014-2020 Programme (11%, n=1 of 9 respondents).

²²⁷ 20% (n=10) out of 51 respondents in the later Programme, compared to no mentions of this in the earlier Programme.

²²⁸ 16% (n=8) of 51 respondents familiar with the 2021-2027 Programme mentioned this added value, in comparison with 11% (n=1) of 9 respondents familiar with the 2014-2020 Programme.

²²⁹ For those familiar with the 2021-23 Programme, 84% (n=441) out of 522 respondents rated this as an area where Creative Europe provides a very large or large added value. For those familiar with the 2014-2020 Programme, 84% (n=290) out of 347 respondents rated this as an area where Creative Europe provides a very large or large added value. This was the highest rated area in terms of added value for both programming periods.

engagement of citizens and intercultural dialogue (the second highest rated area for added value in both Programmes)²³⁰. Other areas where both Programmes were similarly rated as having a large added value were the **transnational character of actions and activities**, which complement regional, national, international and other Union programmes and policies²³¹ and the **promotion of European common roots and cultural diversity**.²³² For Culture strand/Sub-programme respondents in the OPC, there were far fewer respondents familiar with the earlier Programme,²³³ so the findings from the OPC need to be interpreted with this consideration. Nonetheless, the OPC also revealed that there were strong similarities in the areas where the Programmes had a large added value. The two areas that were rated to be the greatest contribution areas of the earlier and later Programme were consistently the **transnational character of actions and activities**²³⁴ and the Programme's promotion of **cross-border cooperation, including through mobility**.²³⁵

For Culture respondents, there is some evidence to suggest that the 2021-2027 Programme offered a greater diversity of cultural activities and initiatives connecting (culturally diverse) people than the predecessor Programme²³⁶. For example, when comparing perceptions of the 2014-2020 Programme with the 2021-2027 Programme in terms of what they offer in addition to other support schemes, there are variations in some results in the OPC. Respondents familiar with the 2021-2027 Programme in the OPC mentioned the value of the cultural diversity promoted by Creative Europe projects (in comparison to other schemes at international and national level) more frequently than respondents familiar with the 2014-2020 Programme.²³⁷ The interviewees also mentioned that the later Creative Europe Programme (2021-2027) offers additional value through new initiatives, such as the Culture Moves Europe and Pan-European Cultural Entities. These actions have facilitated new networks and collaborations between artists from different countries, with stakeholders

²³⁰ For those familiar with the 2021-23 Programme, 80% (n=415) out of 522 respondents rated this as an area where Creative Europe provides a very large or large added value. For those familiar with the 2014-2020 Programme, 75% (n=259) out of 347 respondents rated this as an area where Creative Europe provides a very large or large added value. This was the second highest rated area in terms of added value for both Programmes.

²³¹ For those familiar with the 2021-23 Programme, 76% (n=399) out of 522 respondents rated this as an area where Creative Europe provides a very large or large added value (fourth highest rated area). For those familiar with the 2014-2020 Programme, 74% (n=256) out of 347 respondents rated this as an area where Creative Europe provides a very large or large added value (third highest rated area).

²³² For those familiar with the 2021-23 Programme, 79% (n=410) out of 522 respondents rated this as an area where Creative Europe provides a very large or large added value. For those familiar with the 2014-2020 Programme, 75% (n=259) out of 347 respondents rated this as an area where Creative Europe provides a very large or large added value.

²³³ 13 respondents were familiar with the 2014-2020 Programme, and 53 were familiar with the 2021-2027 Programme.

²³⁴ In the 2021-27 Programme, this was the highest rated area of very large or large added value, with 89% (n= 40) of 53 respondents saying that this area had an added value to a very large or large extent; and in the 2014-2020 Programme, this was the second highest rated area, with 77% (n=10) of 13 respondents.

²³⁵ In the 2021-27 Programme, this was the second highest rated area having a very large or large added value with 87% (n=39) of 53 respondents rating that this area had an added value to a very large or large added value; in the 2014-2020 Programme, this was the highest rated area, with 85% (n=11) of 13 respondents.

²³⁶ It could also be that the OPC is less representative with its findings, as there were much fewer respondents of the earlier Programme than with the later Programme. Also, it should be noted that the beneficiary survey had a larger number of respondents for these questions compared to the OPC.

²³⁷ 24% (n=12) of 49 respondents familiar with the Culture strand of the 2021-2027 Programme mentioned this, compared to 8% (n=1) of 12 respondents familiar with the Culture Sub-programme of the 2014-2020 Programme.

citing examples of how they have led to long-term national projects and associations²³⁸. In the OPC, there were also some differences in how respondents rated the Programme's contribution to fostering additional funding opportunities for the AV and cultural creative sector – this was the third highest rated area in terms of added value for the 2014-2020 Programme²³⁹, whereas respondents familiar with the later Programme rated other areas more highly than this. For example, the 2021-27 Programme was considered to provide more of an added value in promoting access to culture, the active engagement of citizens and intercultural dialogue²⁴⁰ and the promotion of European common roots and cultural diversity²⁴¹. In the earlier programming period for OPC respondents, these areas were some of the lowest rated areas in terms of added value²⁴².

As regards the Cross-sectoral strand, the beneficiary survey had the strongest data on comparisons about this strand between the two programming periods (in the OPC, there were less than 3 respondents who were familiar with the cross-sectoral strands of the Programmes). In the survey, the areas where Creative Europe had the largest added value were similar across both programming periods: **cross-border cooperation, including through mobility** (the highest rated area for added value for both programming periods)²⁴³ and **the transnational character of actions and activities**, which complement regional, national, international and other Union programmes and policies (the second highest rated area for both programming periods)²⁴⁴. Other areas that were rated highly in terms of added value, were how the Programme **addresses common challenges, including the digital shift, via cooperation**²⁴⁵ and **promoting access to culture, active engagement of citizens and intercultural dialogue**.²⁴⁶ From the limited available data from the OPC, it appears that the 2021-2027 Programme was rated to have a higher added value in the cross-sectoral strand in promoting cross-border cooperation, including through

²³⁸ Interview with representatives of a sectoral organisation and a CE Desk

²³⁹ For those familiar with the 2014-2020 Programme, 69% (n=9) out of 13 respondents expressed added value created in this area. The largest added value was calculated by compounding respondents who stated that an area had an added value to a very large or a large extent. This was the third most highly rated area.

²⁴⁰ 73% (n=33) of 53 respondents. The largest added value was calculated by compounding respondents who stated that an area had an added value to a very large or a large extent. This was the third highest rated area.

²⁴¹ 71% (n=32) of 53 respondents. The largest added value was calculated by compounding respondents who stated that an area had an added value to a very large or a large extent. This was the fourth highest rated area.

²⁴² Only 38% (n=5) of 13 respondents indicated that these areas had an added value to a very large or large extent.

²⁴³ 87% (n=68) of 78 respondents familiar with the Cross-sectoral strand of the 2021-2023 Programme mentioned this, compared to 60% (n=6) of 10 respondents familiar with the Cross-sectoral strand of the 2014-2020 Programme.

²⁴⁴ 86% (n=67) of 78 respondents familiar with the Cross-sectoral strand of the 2021-2023 Programme mentioned this, compared to 70% (n=6) of 10 respondents familiar with the Cross-sectoral strand of the 2014-2020 Programme.

²⁴⁵ 78% (n=61) of 78 respondents familiar with the Cross-sectoral strand of the 2021-2023 Programme mentioned this (the highest rated area), compared to 60% (n=6) of 10 respondents familiar with the Cross-sectoral strand of the 2014-2020 Programme (the second highest rated area).

²⁴⁶ 79% (n=62) of 78 respondents familiar with the Cross-sectoral strand of the 2021-2023 Programme mentioned this, compared to 60% (n=6) of 10 respondents familiar with the Cross-sectoral strand of the 2014-2020 Programme. These were the third highest rated areas for both Programmes.

mobility; in addressing common challenges (including the digital shift, via cooperation); fostering economies of scale and growth and jobs; and fostering additional funding opportunities for the Audiovisual and cultural creative sector.²⁴⁷

ANNEX VI. CREATIVE EUROPE PROGRAMME SPECIFIC PRIORITIES

Creative Europe 1	Creative Europe 2
(a) to support the capacity of the European cultural and creative sectors to operate transnationally and internationally; (b) to promote the transnational circulation of cultural and creative works and transnational mobility of cultural and creative players, in particular artists, as well as to reach new and enlarged audiences and improve access to cultural and creative works in the Union and beyond, with a particular focus on children, young people, people with disabilities and under-represented groups; (c) to strengthen the financial capacity of SMEs and micro, small and medium-sized organisations in the cultural and creative sectors in a sustainable way, while endeavouring to ensure a balanced geographical coverage and sector representation; (d) to foster policy development, innovation, creativity, audience development and new business and management models through support for transnational policy cooperation.	a) to enhance artistic and cultural cooperation at the European level in order to support the creation of European works and strengthen the economic, social and external dimension of and innovation and mobility in Europe's cultural and creative sectors (Culture strand); (b) to promote competitiveness, scalability, cooperation, innovation and sustainability, including through mobility, in the European audiovisual sector (Media strand); (c) to promote policy cooperation and innovative actions supporting all strands of the Programme and to promote a diverse, independent and pluralistic media environment, and media literacy, thereby fostering freedom of artistic expression, intercultural dialogue and social inclusion (Cross-sectoral strand).

The **priorities** of the three different Sub-programmes/strands are as follows:

Creative Europe 1	Creative Europe 2
Culture Sub-programme	Culture strand

²⁴⁷ In all of these 4 areas, 100% (n=3) of 3 respondents rated that the 2021-2027 Creative Europe Programme provided a very large or large added value in this area, compared to 50% (n=1) of 2 respondents filtered for the same criteria in the 2014-2020 Programme.

1. The priorities in the field of reinforcing the cultural and creative sectors' capacity to operate transnationally shall be the following: (a) supporting actions providing cultural and creative players with skills, competences and know-how that contribute to strengthening the cultural and creative sectors, including encouraging adaptation to digital technologies, testing innovative approaches to audience development and testing new business and management models; (b) supporting actions enabling cultural and creative players to cooperate internationally and to internationalise their careers and activities in the Union and beyond, where possible on the basis of long-term strategies; (c) providing support to strengthen European cultural and creative organisations and international networking in order to facilitate access to professional opportunities. 2. The priorities in the field of promoting transnational circulation and mobility shall be the following: (a) supporting international touring, events, exhibitions and festivals; (b) supporting the circulation of European literature with a view to ensuring its widest possible accessibility; (c) supporting audience development as a means of stimulating interest in, and improving access to, European cultural and creative works and tangible and intangible cultural heritage.	(a) to strengthen transnational cooperation and the cross-border dimension of the creation, circulation and visibility of European works and the mobility of operators in the cultural and creative sectors; (b) to increase access to and participation in culture and to increase audience engagement and improve audience development across Europe; (c) to promote societal resilience and to enhance social inclusion and intercultural dialogue through culture and cultural heritage; (d) to enhance the capacity of the European cultural and creative sectors, including the capacity of individuals working in those sectors, to nurture talent, to innovate, to prosper and to generate jobs and growth; (e) to strengthen European identity and values through cultural awareness, arts education and culture-based creativity in education; (f) to promote capacity-building within the European cultural and creative sectors, including grassroots organisations and micro-organisations, so that they are able to be active at the international level; (g) to contribute to the Union's global strategy for international relations through culture.
MEDIA Sub-programme	MEDIA strand
1. The priorities in the field of reinforcing the European audiovisual sector's capacity to operate transnationally shall be the following: (a) facilitating the acquisition and improvement of skills and competences of audiovisual professionals and the development of networks, including the use of digital technologies to ensure adaptation to market development, testing new approaches to audience development and testing new business models; (b) increasing the capacity of audiovisual operators to develop European audiovisual works with a potential to circulate in the Union and beyond and to facilitate European and international co-production, including with television broadcasters; (c) encouraging business-to-business exchanges by facilitating access to markets and business tools enabling audiovisual operators to increase the visibility of their projects on Union	1. In line with the Programme objectives referred to in Article 3, the Media strand shall have the following priorities: (a) to nurture talent, competence and skills and to stimulate cross-border cooperation, mobility, and innovation in the creation and production of European audiovisual works, thereby encouraging collaboration across Member States with different audiovisual capacities; (b) to enhance the circulation, promotion, online distribution and theatrical distribution of European audiovisual works within the Union and internationally in the new digital environment, including through innovative business models; (c) to promote European audiovisual works, including heritage works, and to support the engagement and development of audiences of all ages, in particular young audiences, across Europe and beyond.

and international markets. 2. The priorities in the field of promoting transnational circulation shall be the following: (a) supporting theatrical distribution through transnational marketing, branding, distribution and exhibition of audiovisual works; (b) promoting transnational marketing, branding and distribution of audiovisual works on all other non-theatrical platforms; (c) supporting audience development as a means of stimulating interest in, and improving access to, European audiovisual works, in particular through promotion, events, film literacy and festivals; (d) promoting new distribution modes in order to allow the emergence of new business models.	2. The priorities set out in paragraph 1 of this Article shall be addressed through support for the development, production, promotion, and dissemination of European works and support for access to those works, with the objective of reaching diverse audiences within Europe and beyond, thereby adapting to new market developments and accompanying the implementation of Directive 2010/13/EU. 3. The actions through which the priorities set out in paragraph 1 of this Article are to be pursued are set out in Section 2 of Annex I.
Cross-Sectoral strand	Cross-Sectoral strand
Cultural and Creative Sectors Guarantee Facility 1. The Commission shall establish a Guarantee Facility targeting the cultural and creative sectors. The Guarantee Facility shall operate as a self-standing instrument and shall be set up and managed in accordance with Title VIII of the Financial Regulation. 2. The Guarantee Facility shall have the following priorities: (a) to facilitate access to finance for SMEs and micro, small and medium-sized organisations in the cultural and creative sectors; (b) to improve the capacity of participating financial intermediaries to assess the risks associated with SMEs and micro, small and medium-sized organisations in the cultural and creative sectors and with their projects, including through technical assistance, knowledge-building and networking measures. The priorities shall be implemented in accordance with Annex I. 3. In accordance with Article 139(4) of the Financial Regulation, the Commission shall implement the Guarantee Facility in an indirect management mode by entrusting tasks to the EIF as referred to in point (iii) of Article 58(1)(c) of that Regulation,	1. In line with the Programme objectives referred to in Article 3, the Cross-sectoral strand shall have the following priorities: (a) to support cross-sectoral transnational policy cooperation, including cooperation on the promotion of the role of culture in social inclusion and cooperation on artistic freedom, to promote the visibility of the Programme and to support the transferability of the results of the Programme; (b) to encourage innovative approaches to the creation, distribution and promotion of, and access to, content across cultural and creative sectors and other sectors, including by taking into account the digital shift, covering both market and non-market dimensions; (c) to promote cross-sectoral activities that aim at adjusting to the structural and technological changes faced by the media, including enhancing a free, diverse, and pluralistic media environment, quality journalism and media literacy, including in the digital environment; (d) to support the establishment of Programme desks in participating countries and the activities of Programme desks and

subject to the terms of an agreement between the Commission and the EIF. Transnational policy cooperation 1. In order to promote transnational policy cooperation, the Cross-sectoral Strand shall support: (a) transnational exchange of experiences and know-how in relation to new business and management models, peer learning activities and networking among cultural and creative organisations and policy-makers related to the development of the cultural and creative sectors, promoting digital networking where appropriate; (b) the collection of market data, studies, analysis of labour market and skills needs, European and national cultural policies analysis and support for statistical surveys based on instruments and criteria specific to each sector and evaluations, including measurement of all aspects of the impact of the Programme; (c) payment of the contribution fee for Union membership of the Observatory to foster data collection and analysis in the audiovisual sector; (d) testing of new and cross-sectoral business approaches to funding, distributing and monetising creation; (e) conferences, seminars and policy dialogue, including in the field of cultural and media literacy, promoting digital networking where appropriate; (f) the Creative Europe Desks referred to in Article 16 and the performance of their tasks. 2. By 30 June 2014, the Commission shall carry out a feasibility study exploring the possibility of collecting and analysing data in the cultural and creative sectors other than the audiovisual sector, and shall present the results of that study to the European Parliament and to the Council. Depending on the results of the feasibility study, the Commission may submit a proposal to amend this Regulation accordingly. Creative Europe Desks	to stimulate cross-border cooperation and the exchange of best practices within the cultural and creative sectors. 2. The actions through which the priorities set out in paragraph 1 of this Article are to be pursued are set out in Section 3 of Annex I.
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| <ol style="list-style-type: none">1. The countries participating in the Programme, acting together with the Commission, shall establish Creative Europe Desks in accordance with their national law and practice (the "Creative Europe Desks").2. The Commission shall support a network of Creative Europe Desks.3. The Creative Europe Desks shall carry out the following tasks, while taking into account the specific characteristics of each sector:<ol style="list-style-type: none">(a) provide information about, and promote, the Programme in their country;(b) assist the cultural and creative sectors in relation to the Programme and provide basic information on other relevant support opportunities available under Union policy;(c) stimulate cross-border cooperation within the cultural and creative sectors;(d) support the Commission by providing assistance regarding the cultural and creative sectors in the countries participating in the Programme, for example through the provision of available data on those sectors;(e) support the Commission in ensuring proper communication and dissemination of the results and impacts of the Programme;(f) ensure the communication and dissemination of information concerning the Union funding awarded and the results obtained for their country.4. The Commission, acting together with the Member States, shall ensure the quality and results of the service provided by the Creative Europe Desks through regular and independent monitoring and evaluation. | |
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ANNEX VII. LIST OF PROGRAMME INDICATORS

Creative Europe 1 Indicators:

Indicators for the general objectives referred to in Article 3 of the Programme's regulation:	Indicators for the specific objective referred to in point (a) of the Programme's specific objectives:	Indicators for the specific objective referred to in point (b) of the Programme's specific objectives as regards the MEDIA Sub-programme:	Indicators for the specific objective referred to in point (b) of the Programme's specific objectives as regards the Culture Sub-programme:
(i) the cultural and creative sectors' level, change in and share of employment and share of gross domestic product; (ii) the number of people accessing European cultural and creative works, including, where possible, works from countries other than their own; <u>The indicators for the general objectives were completed as follows:</u> a) the number of jobs generated by the Programme in the Cultural and Creative sectors; b) the financial contribution of the Cultural and Creative sectors leveraged by the Programme for the funded projects; c) the number of people accessing European cultural and creative works generated by the Programme, including,	(i) the scale of international activities of cultural and creative organisations and the number of transnational partnerships created; (ii) the number of learning experiences and activities supported by the Programme which have improved the competences and increased the employability of cultural and creative players, including audiovisual professionals; <u>The indicators for this specific objective were completed as follows:</u> a) the number and scale of transnational partnerships created with the support of the Programme, including the country of origin of the beneficiary organisations; b) the number of cultural and creative activities organised transnationally with the Culture Sub-programme's support;	(i) the number of admissions for non-national European films in Europe and European films worldwide (10 most important non-European markets) in cinemas; (ii) the percentage of European audiovisual works in cinemas, on television and on digital platforms; (iii) the number of people in the Member States accessing non-national European audiovisual works and the number of people in the countries participating in the Programme accessing European audiovisual works; (iv) the number of European video games produced in the Union as well as in the countries participating in the Programme; <u>The indicators for this specific objective were completed as follows:</u>	(i) the number of people directly and indirectly reached through projects supported by the Programme; (ii) the number of projects addressed to children, young people and under-represented groups and the estimated number of people reached; <u>The indicators for this specific objective were completed as follows:</u> a) the number of artists and cultural and creative professionals as well as general public, directly and indirectly reached through projects supported by the Culture Sub-programme; b) the number of supported project participants who report new or enhanced market or professional opportunities; c) the number of projects supported by the Programme addressed to disadvantaged groups, among others

where possible, works from countries other than their own; d) the number and share of audiovisual companies that report improved market position due to MEDIA Sub-programme support.	c) the number of participants in learning experiences and activities, supported by the Programme, having improved their competences and increased their employability (including the proportion of women); d) qualitative evidence of success stories in the field of artistic, business and technological innovation due to the Programme support; e) list of awards, nominations and prizes granted to audiovisual works supported by the MEDIA Sub-programme in the framework of the main major international festivals and national academies (including Berlinale, Cannes, Oscars, European Film Awards).	a) the number of admissions in the Member States for films from other Member States, distributed in the Union with the support of the Programme; b) the share of admissions in the Member States for films from other Member States; c) the percentage of the Union audiovisual works in cinemas and on digital platforms supported by the Programme; d) the average number of non-national territories in which the supported titles or films and television works have been distributed; e) the number of co-productions developed and created with the support of the Programme, including the share of co-productions with diverse partners; f) the proportion of audiovisual works supported by the MEDIA Sub-programme, which are directed or written by women.	people with a migrant background, people with disabilities and unemployed persons, especially unemployed young people. d) the size (micro, small, medium-sized and large) of the organisations participating in the projects (annual headcount and annual turnover or annual balance sheet); e) the number and relative share of small-scale and large-scale cooperation projects supported by the Culture Sub-programme; f) the number of artists and cultural and creative professionals geographically mobile beyond national borders due to the Culture Sub-programme support, by country of origin and gender; g) the number of literary translations undertaken per year with the Programme support; h) the number and percentage of translations from lesser-used languages supported by the Programme; i) the number of books produced with the support of the Programme.
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Indicator name	Results 2020	Initial Target (end of 2020)	Target reached
Indicators for the general objectives referred to in Article 3 of the Programme's regulation			

cultural and creative sectors' level, change in and share of employment and share of gross domestic product; (Total European Workforce)	3.8%	4%	Discontinued after Delegated Act
number of people accessing European cultural and creative works, including, where possible, works from countries other than their own;			Discontinued after Delegated Act
Specific objective 1			
scale of international activities of cultural and creative organisations and the number of transnational partnerships created	10 289	8000	Yes
the number of learning experiences and activities supported by the Programme which have improved the competences and increased the employability of cultural and creative players, including audiovisual professionals;	190 000 (2017)	240 000	
Ad. Specific Objective 3:			
volume of loans guaranteed in the framework of the Guarantee Facility, categorised by national origin, size and sectors of SMEs and micro, small and medium-sized organisations	825	500	Yes
volume of loans granted by participating financial intermediaries, categorised by national origin	1004	700	Yes
number and geographical spread of participating financial intermediaries (No of financial institutions)	20	10	Yes
number and geographical spread of participating financial intermediaries (No of countries)	12, geo. spread in Reports of EIF	10	Yes
number of SMEs and micro, small and medium-sized organisations benefiting from the Guarantee Facility, categorised by national origin, size and sectors (beneficiaries)	5898	7000	No, because the launch of the Programme was delayed
number of SMEs and micro, small and medium-sized organisations benefiting from the Guarantee Facility, categorised by national origin, size and sectors (sub-sectors)	8	5	Yes, despite the delay of launch
number of SMEs and micro, small and medium-sized organisations benefiting from the Guarantee Facility, categorised by national origin, size and sectors (countries)	23	15	Yes

average default rate of loans	0%	Max. 8%	Yes (the lower the results here, the better)
achieved leverage effect of guaranteed loans in relation to the indicative leverage effect (1:5,7)	1:6.7	1:6.0	Yes
Ad. Specific Objective 4			
number of Member States making use of the results of the open method of coordination in their national policy development	22	20	Yes
number of new initiatives and policy outcomes	10	20	Yes, because the initiatives had a large scope
Indicators integrated in 2019			
the number of jobs generated by the Programme in the Cultural and Creative sectors;			
the financial contribution of the Cultural and Creative sectors leveraged by the Programme for the funded projects;	528 million in MEDIA	n/a	n/a
the number of people accessing European cultural and creative works generated by the Programme, including, where possible, works from countries other than their own;			
Indicators integrated in 2019 – presented in the Monitoring Reports			
the number and scale of transnational partnerships created with the support of the Programme, including the country of origin of the beneficiary organisations;	69% micro and 28% small in MEDIA, 43% micro and 30% small in Culture Qualitative side spread over Monitoring Report	n/a	
the number of participants in learning experiences and activities, supported by the Programme, having improved their competences and increased their employability (including the proportion of women);	2445 in MEDIA – p.49 of Monitoring Report	n/a	
qualitative evidence of success stories in the field of artistic, business and technological innovation due to the Programme support;	Spread over the Monitoring Report	n/a	n/a

Culture sub-Programme:

Indicator name	Results 2020	Initial Target (end of 2020)	Target reached
the number of people directly and indirectly reached through projects supported by the Programme (in million)	17	5% increase of the 2017 results: 3.36	Yes
the number of projects addressed to children, young people and under-represented groups and the estimated number of people reached (in millions);	3.5	Increaser of 7% from 2017 results: 1.712	Yes
Indicators integrated in 2019			
the number of artists and cultural and creative professionals as well as general public, directly and indirectly reached through projects supported by the Culture Sub-programme	4 375 beneficiary organisations Audience: 91.5 million people reached	N/A	N/A
the number of projects supported by the Programme addressed to disadvantaged groups, among others people with a migrant background, people with disabilities and unemployed persons, especially unemployed young people.	300	N/A	N/A
the size (micro, small, medium-sized and large) of the organisations participating in the projects (annual headcount and annual turnover or annual balance sheet);	N/A	N/A	N/A
the number and relative share of small-scale and large-scale cooperation projects supported by the Culture Sub-programme;	489 small scale (79%) 128 large scale (21%) 617 Cooperation projects	N/A	N/A
the number of artists and cultural and creative professionals geographically mobile beyond national borders due to the Culture Sub-programme support, by country of origin and gender;	22,763	N/A	N/A

the number of literary translations undertaken per year with the Programme support;	>500	N/A	N/A
the number and percentage of translations from lesser-used languages supported by the Programme;	70% coming from small languages	N/A	N/A
the number of books produced with the support of the Programme	3,500	N/A	N/A
the number of cultural and creative activities organised transnationally with the Culture Sub-programme's support;	7,500	N/A	N/A

Media Sub-programme/Strand

Indicator name	Results 2020	Initial Target (end of 2020)	Target reached
number of admissions for non-national European films in Europe in cinemas	94 (2018)	71	Yes, discontinued after Delegated Act
number of admissions for European films worldwide (10 most important non-European markets) in cinemas	87 (2018)	85	Yes, discontinued after Delegated Act
percentage of European audiovisual works in cinemas,	68% (2018)	59%	Yes, discontinued after Delegated Act
percentage of European audiovisual works on television	35% (2018)	35%	Yes, discontinued after Delegated Act
percentage of European audiovisual works on digital platforms	30% (2018)	27%	Yes, discontinued after Delegated Act
number of people in the Member States accessing non-national European audiovisual works	258 (2017)	288	No, discontinued after Delegated Act
number of people in the countries participating in the Programme accessing European audiovisual works	262 (2017)	300	No, discontinued after Delegated Act
number of European video games produced in the Union as well as in the countries participating in the Programme (proxy – turnover)	15 bn (2015)	16 bn	No, discontinued after Delegated Act
Indicators integrated in 2019 – presented in Monitoring Reports			

list of awards, nominations and prizes granted to audiovisual works supported by the MEDIA Sub-programme in the framework of the main major international festivals and national academies (including Berlinale, Cannes, Oscars, European Film Awards).	165 (2017-2020)	n/a	n/a
number and share of audiovisual companies that report improved market position due to MEDIA Sub-programme support.	87% p.46 of Monitoring Report	n/a	n/a
number of admissions in the Member States for films from other Member States, distributed in the Union with the support of the Programme;	136 million of documented admissions p.41 of Monitoring Report	n/a	n/a
share of admissions in the Member States for films from other Member States;	6%	n/a	n/a
average number of non-national territories in which the supported titles or films and television works have been distributed;	4.5 for cinemas	n/a	n/a
number of co-productions developed and created with the support of the Programme, including the share of co-productions with diverse partners	388 intra-EU co-productions (83% of film and TV projects). Additionally, 197 co-productions with developing countries.2014-2020.	n/a	n/a
proportion of audiovisual works supported by the MEDIA Sub-programme, which are directed or written by women.	From 22% to 41%/ Detailed results presented in p.23 of Monitoring Report	n/a	n/a
the percentage of the Union audiovisual works in cinemas and on digital platforms supported by the Programme;	From 11% to 20% (Detailed results in p.52;54)	n/a	n/a

Creative Europe 2:

Indicator name	Baseline	Achievement level in 2023	Target end of 2027	Progression to target
KPI I: Number and scale of transnational partnerships created with the support of the Programme (Partnership)	132	465	990	47%
KPI 1: Number and scale of transnational partnerships created with the support of the Programme (Organisations)	772	2,974	5,787	51%
KPI 2: Number of artists & cultural &/or creative players (geographically) mobile beyond national borders due to Programme support, by country of origin (Number of mobilities)*	22 549	24,590	176,053	14%
KPI 2: Number of artists & cultural &/or creative players (geographically) mobile beyond national borders due to Programme support, by country of origin (proportion of women)*	40%	53.3%	40%	On track
KP3: Number of people accessing European cultural and creative works generated by the Programme, including works from countries other than their own (in millions)*	73	3	552	May not be reached
KPI 4: The number of projects supported by the Programme addressed to socially marginalised groups	37	127	279	46%
KPI 5: The number of projects supported by the Programme involving third countries organisations	58	372	432	86%

MEDIA-related				
The number of people accessing European audiovisual works from countries other than their own and supported by the Programme	9	17.8 (qualitative aspects on geographical spread in Monitoring Report 2021-2022)	93	Yes, it is a cumulative target. 40% achieved in the first 2 years.
Number of participants in learning activities supported by the Programme who assess they have improved their competences and increased their employability (including the proportion of women)	2200 (and 55%)	1483 (59%)	15760 (55%)	Yes, it is a cumulative target. 23% achieved in first 2 years.
Number, budget and geographical origins of co-productions developed, created and distributed with the support of the Programme as well as co-productions with partners from countries with different audiovisual capacities; and number of audiovisual works in lesser used languages developed, and produced and distributed with the support of the Programme	397 (and 155 million EUR)	549 (2844 million EUR)	3000 (1165 million)	Yes, it is a cumulative indicator. 72% achieved in the first 3 years.
Number of people reached by Business-to-Business promotional activities in major markets	180 000	51 821	1 800 000	May not be reached, as COVID lockdowns changed events trends long-term.

The number of audiovisual works in lesser-used languages developed, produced and distributed with the support of the Programme	385	219	2845	Yes, it is a cumulative target. Data arrives with long delay.
CROSS-SECTORAL-related				
Number and scale of transnational partnerships formed (composite indicator for creative innovation labs and news media actions)	8 (39 organisations)	18 (95 organisations)	20 (70)	Yes
Number of events or activities promoting the Programme organised by the Programme's desks	400	671	2800	Yes. It is a cumulative target.
Number of participants in the creative innovation labs and news media actions activities, including the proportion of women	No baseline	2187 (45%)	300 (50%)	Yes. It is a new scheme, in reality it organises more events than was expected.
Indicator name	Baseline	Achievement level in 2023	Target (end of 2027)	Progression to target
Number and scale of transnational partnerships created with the support of the Programme, including the country of origin of the beneficiary organisations (Partnerships)	200	799	1,490	54%
Number and scale of transnational partnerships created with the support of the Programme, including the country of	2 375	7,917	16,760	47.2%

origin of the beneficiary organisations (organisations)				
Qualitative evidence of success stories in the field of artistic, business and technological innovation due to the Programme's support	20/year	30/year	140	On track

* The data provided for years 2021 and 2022 comes from the continuous reporting in eGrants for projects funded under the COOP, LIT, NET, PLAT and PECE calls. The are allocated to the WP year under which the call was published (there is no data source that would allow allocation of people to the year in which the mobility took place). This data is provisional and indicative at the time of reporting (end-2023).